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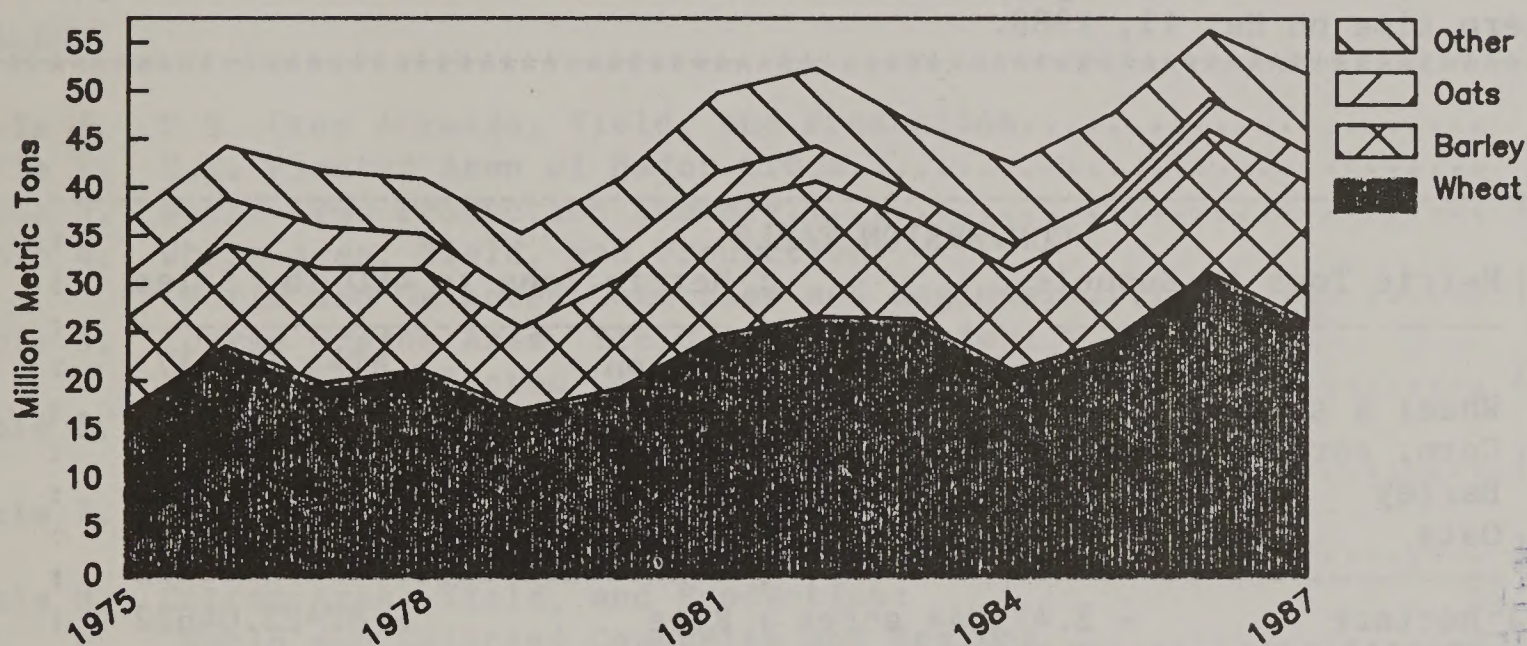
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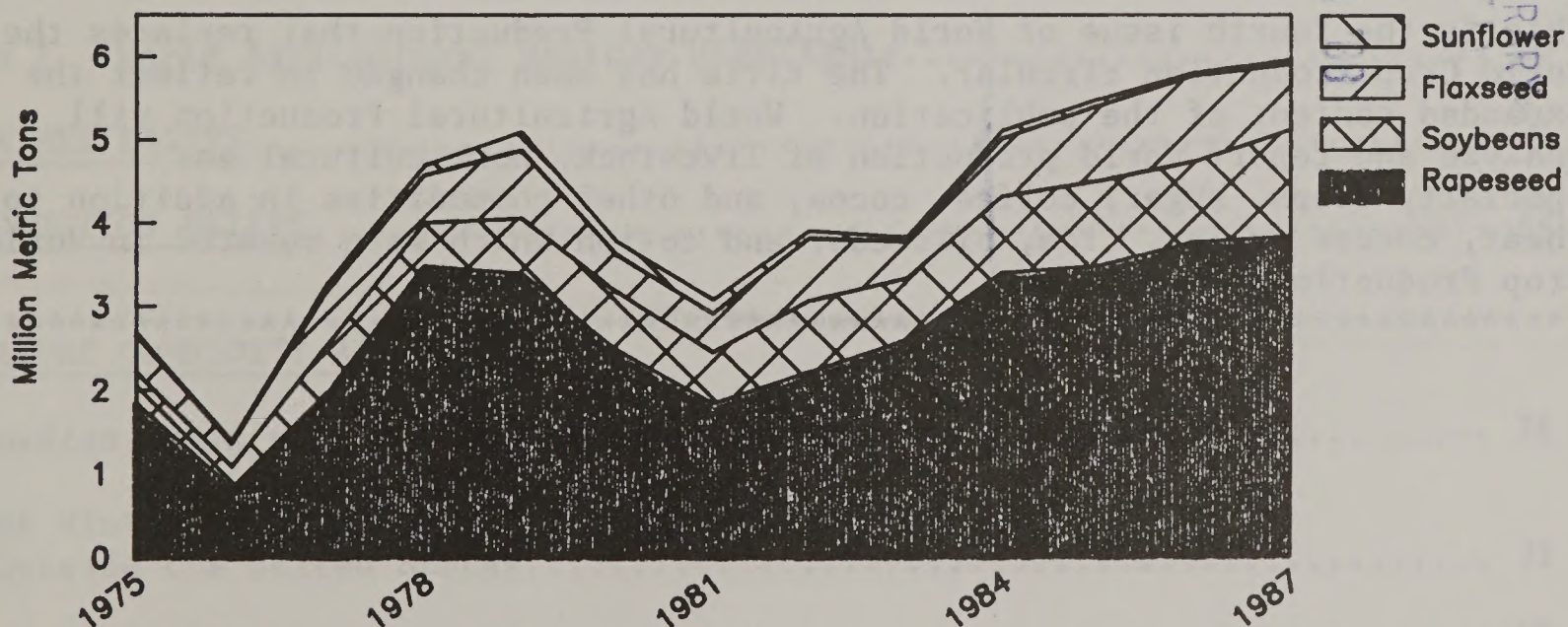
April 1988

# World Agricultural Production

## CANADIAN GRAIN PRODUCTION



## CANADIAN OILSEED PRODUCTION



\*\*\*\*\*  
\*  
\* This issue of World Agricultural Production includes a production feature with\*  
\* more information on Canadian Grains and Oilseeds and a production feature \*  
\* entitled "1988 Winter Grains Prospects." \*  
\*\*\*\*\*

Approved by the World Agricultural Outlook Board – USDA



This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. All numbers in this report are based on unrounded data and detail may not add to totals because of rounding.

This report was prepared by the Foreign Production Estimates Division (FPED), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888.

\*\*\*\*\*  
 \*The next issue of World Agricultural Production will be released at 3 p.m. \*  
 \*eastern time on May 11, 1988. \*  
 \*\*\*\*\*

CONVERSION TABLE			
:	Metric Tons to Bushels	:	Metric Tons to 480-lb. Bales
:	-----	:	-----
:		:	Cotton = MT*4.592917
:	Wheat & soybeans = MT*36.7437	:	
:	Corn, sorghum, rye = MT*39.36825	:	
:	Barley = MT*45.929625	:	
:	Oats = MT*68.894438	:	Metric tons to hundredweight
:	-----	:	-----
:	1 hectare = 2.471044 acres	:	Rice = MT*22.04622
:	1 kilogram = 2.204622 pounds	:	

\*\*\*\*\*  
 \*This is the fourth issue of World Agricultural Production that replaces the \*  
 \*World Crop Production circular. The title has been changed to reflect the \*  
 \*expanded content of the publication. World Agricultural Production will \*  
 \*analyze and report world production of livestock, horticultural and \*  
 \*specialty crops, sugar, coffee, cocoa, and other commodities in addition to \*  
 \*wheat, coarse grains, rice, oilseeds, and cotton which were covered in World\*  
 \*Crop Production. \*  
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## PRODUCTION HIGHLIGHTS FOR 1987/88

**WHEAT:** World production for 1987/88 is estimated at 502.2 million metric tons, up 0.5 million or less than 1 percent from last month, but down 5 percent from last year's record harvest. Important changes from a month ago include the following:

- o China Production is estimated at 87.7 million tons, up 0.7 million or 1 percent from last month, but down 3 percent from last year's record. The change is due to a recent announcement by the State Statistical Bureau (SSB). The increase is attributed to higher estimated yield.
- o Mongolia Production is estimated at 0.6 million tons, up 0.3 million or 100 percent from last month, but down 10 percent from last year. The revision is based on higher estimated area and yield.
- o North Korea Production is estimated at 0.6 million tons, up 0.2 million or 50 percent from last month, but unchanged from last year. The revision is due to higher estimated area and yield.
- o EC-12 Production is estimated at 71.3 million tons, down 1.0 million or 1 percent from last month and down less than 1 percent from last year. The change reflects the most recent estimate of production by the French National Cereals Office (ONIC), which revised output down 836,000 tons, and lower Ministry of Agriculture estimates of Belgian production.

**COARSE GRAINS:** World production for 1987/88 is estimated at 786.9 million tons, down 3.0 million or less than 1 percent from last month and down 6 percent from last year's crop. Important changes from a month ago include the following:

- o Sudan Production is estimated at 2.0 million tons, down 1.6 million or 44 percent from last month and down 49 percent from last year. The revision is due to lower estimated sorghum area as a result of poor price incentives. Sorghum production is estimated at 1.6 million tons.



- o China Production is estimated at 93.8 million tons, down 1.5 million tons or 2 percent from last month, but up 6 percent from last year. The change is due to lower estimated corn (-1.0 MMT) and barley (-0.5 MMT) production based on official SSB data on total coarse grain output.
- o Uruguay Production is estimated at 0.3 million tons, down 0.3 million or 52 percent from last month, but up 7 percent from last year's revised estimate. The sharp decline reflects a series revision based on official Uruguayan statistics.
- o Venezuela Production is estimated at 1.9 million tons, down 0.2 million or 10 percent from last month and down 3 percent from last year. The reduction is due to lower estimated area and yield for sorghum because of dry weather and poor seed quality.
- o Niger Production is estimated at 1.4 million tons, down 0.2 million or 15 percent from last month, and down 24 percent from last year's record. The revision is largely due to reduced area estimates for millet and sorghum.
- o Brazil Production is estimated at 23.7 million tons, up 0.6 million or 3 percent from last month, but down 13 percent from last year's record harvest. The revision is attributed to an increase in corn area planted in the northeast, as well as slightly higher estimated barley and oat production. Corn output is estimated at 23.0 million tons.
- o North Korea Production is estimated at 2.6 million tons, up 0.2 million or 10 percent from last month, but unchanged from last year. The increase reflects higher estimated corn area.

**RICE (MILLED-BASIS):** World production for 1987/88 is estimated at 303.9 million tons, up 2.0 million or less than 1 percent from last month and down 4 percent from the 1986/87 crop. This year's world rice crop is expected to be the smallest since 1982/83. Important changes from a month ago include the following:



o India

Production is estimated at 51.0 million tons, up 2.0 million or 4 percent from last month, but down 16 percent from last year. Recent FAS field travel along with official data from various states indicates higher yields. The flood loss in West Bengal was not as serious as initially expected and good rains in October through January in central and southern India enabled many states to salvage a portion of their late planted rice crops.

o Brazil

Production is estimated at 7.5 million tons, up 0.5 million or 8 percent from last month and up 6 percent from last year's record. The revision is due to higher estimated yields in the northern producing states.

o North Korea

Production is estimated at 3.9 million tons, up 0.3 million or 7 percent from last month, but unchanged from last year. The decline is due to higher estimated area.

o China

Production is estimated at 121.8 million tons, down 0.7 million tons or less than 1 percent from last month, but up 1 percent from last year's harvest. The new estimate reflects official 1987 preliminary statistics from the SSB. Higher yields offset slightly lower planted area.

**OILSEEDS:** World production for 1987/88 is estimated at a record 203.8 million tons, up 0.1 million or less than 1 percent from last month and up almost 5 percent from last year. U.S. production is estimated at 60.1 million tons, essentially unchanged from last month, but up 1 percent from last year. Foreign production is estimated at a record 143.7 million tons, up 0.1 million or less than 1 percent from last month and up 7 percent from last year.

\* **Soybeans:** World production for 1987/88 is estimated at a record 101.3 million tons, down 0.1 million or less than 1 percent from last month, but up 3 percent from last year. Significant changes from a month ago include the following:

o Brazil

Production for 1987/88 is estimated at 18.0 million tons, down 0.5 million or 3 percent from last month, but up 4 percent from last season. The decreased production is attributed to lower estimated average yield. Crop prospects deteriorated in Rio Grande do Sul during March. Below normal rainfall and high temperatures in the state resulted in yield losses, especially in the late planted crop that was at a critical growth stage. The late planted crop comprises about one-third of the total crop in the state.



o China Production for 1987/88 is estimated at a record 12.1 million tons, up 0.3 million or 2 percent from last month and up 4 percent from last year. The revised production estimate was released by the SSB in March. Preliminary area was released last fall by the SSB and is unchanged this month.

\* Cottonseed: World production for 1987/88 is estimated at 30.6 million tons, up marginally from last month and up 12 percent from last year.

\* Peanuts: World production for 1987/88 is estimated at 19.1 million tons, up 0.2 million or 1 percent from last month, but down 6 percent from last year. A significant change from last month is the following:

o China Production is estimated at 6.2 million tons, up 0.2 million or 3 percent from last month and up 5 percent from last year. The SSB officially released the revised production estimate in its March monthly report. Preliminary area for 1987 was released last November and is unchanged this month.

\* Sunflowerseed: World production for 1987/88 is estimated at a record 20.4 million tons, down 28,000 tons or less than 1 percent from last month, but up 8 percent from last year.

\* Rapeseed: World production for 1987/88 is estimated at a record 22.9 million tons, up 16,000 tons or less than 1 percent from last month and up 18 percent from last year. A significant change from last month is the following:

o India Production is estimated at 2.9 million tons, up 0.2 million or 7 percent from a month ago and up 10 percent from last season. FAS field travel in the major growing areas reveal increased area in Rajasthan and Haryana as well as improved production prospects in most growing areas. Clear, dry weather limited the aphid infestations that normally reduce rapeseed yields in India.

\* Flaxseed: World production for 1987/88 is estimated at 2.4 million tons, unchanged this month, but down 13 percent from last year.

\* Copra: World production for 1987/88 is estimated at 4.5 million tons, down 4,000 tons or less than 1 percent from last month and down 6 percent from last year.

\* Palm Kernels: World production for 1987/88 is estimated at a record 2.6 million tons, down 3,000 tons or less than 1 percent from last month, but up 5 percent from last year.



\* Palm Oil: World production is estimated at a record 8.4 million tons, essentially unchanged this month, but up 4 percent from last year.

COTTON: World production for 1987/88 is estimated at 79.2 million bales, essentially unchanged from last month, but up 12 percent from a year ago. Foreign output is estimated at 64.5 million bales, basically unchanged from last month, but up 6 percent from 1986/87. U.S. production is estimated at 14.7 million bales, up marginally from last month. Important changes from a month ago include the following:

o Pakistan

Production is estimated at a record 6.8 million bales, up 0.2 million or 2 percent from last month and up 11 percent from last year. This month's estimate is based on total arrivals of cotton to ginneries as of March 31.

o Brazil

Production is estimated at a 3.2 million bales, down 0.1 million or 4 percent from last month, but up 8 percent from last year. Yields in the center-south were reduced by unfavorable weather conditions in late February and March. Approximately 65 percent of the crop has been harvested. The quality of the crop is considered satisfactory in Parana but below normal in Sao Paulo.



TABLE 1  
U.S. Crop Acreage, Yield, and Production 1/

Commodity	--Harvested Area--			--Yield--				--Production--			
	Prel.	Proj.		Prel.	1987/88 Proj.			Prel.	1987/88 Proj.		
	1985/86	1986/87	1987/88	1985/86	1986/87	March	April	1985/86	1986/87	March	April
	--Million Acres--			--Bushels per Acre--				--Million Bushels--			
All Wheat	64.7	60.7	55.9	37.5	34.4	37.6	37.6	2425.1	2091.6	2105.2	2105.2
Winter	48.0	43.2	39.3	38.1	35.2	39.8	39.8	1827.6	1521.5	1562.9	1562.9
Other	16.8	17.5	16.6	35.6	32.5	32.6	32.6	597.5	570.1	542.3	542.3
Rye	0.7	0.7	0.7	28.8	28.8	28.9	28.9	20.6	19.5	19.7	19.7
Soybeans	61.6	58.3	56.4	34.1	33.3	33.7	33.7	2098.5	1940.1	1904.7	1904.7
Corn	75.2	69.2	59.2	118.0	119.3	119.4	119.4	8876.7	8249.9	7064.1	7064.1
Sorghum	16.8	13.9	10.6	66.8	67.7	69.9	69.9	1120.3	938.1	740.9	740.9
Barley	11.6	12.0	10.0	51.0	50.8	52.6	52.6	591.4	610.5	527.0	527.0
Oats	8.2	6.9	6.9	63.7	56.3	54.0	54.0	520.8	386.4	373.8	373.8
	--Million Hectares--			--Metric Tons per Hectare--				--Millions of Metric Tons--			
Total Feedgrains	45.2	41.2	35.1	6.1	6.1	6.1	6.1	274.4	252.4	215.2	215.2
	--Million Acres--			--Pounds per Acre--				---Million CWT.---			
Rice	2.5	2.4	2.3	5414	5651	5482	5482	134.9	133.4	127.7	127.7
								---Million 480-Pound---			
All Cotton	10.2	8.5	10.1	630	552	703	704	13.4	9.7	14.7	14.7

TABLE 2  
U.S. Planted Area of Major Crops

Year	Wheat			Feedgrains									
	Winter	Other	Total	Rye	Rice	Corn	Sorghum	Barley	Oats	Total	Soybeans	Cotton	Total Maj Crops
	--Million Acres--												
1985/86	57.8	17.8	75.6	2.6	2.5	83.4	18.3	13.2	13.3	128.1	63.1	10.7	282.6
1986/87 prel.	54.0	18.1	72.1	2.4	2.4	76.7	15.3	13.1	14.7	119.8	60.4	10.0	267.0
1987/88 proj.													
March	48.8	17.0	65.8	2.5	2.4	65.7	11.8	11.0	18.0	106.5	57.4	10.4	245.0
April	48.8	17.0	65.8	2.5	2.4	65.7	11.8	11.0	18.0	106.5	57.4	10.4	245.0

1/ Estimates from USDA Agricultural Statistics Board.



TABLE 3  
World Crop Production Summary

Commodity	World		Total		North America		Europe		USSR		Asia		South America		Selected Other Countries		All Other Countries
	: :																

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains, and pulses are 191.7 million tons in 1985/86, 210.1 million in 1986/87, and 211.3 million forecast in 1987/88.

2/ Totals for major regions and countries and other countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also include copra and palm kernels for countries shown plus other countries.

Note: Entries of '0.0' indicate no reported or insignificant production.



TABLE 4  
Wheat Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---				---Production---			
	Prel.	Proj.		Prel.	1987/88	Proj.		Prel.	1987/88	Proj.	
	1985/86	1986/87	1987/88	1985/86	1986/87	Mar.	Apr.	1985/86	1986/87	Mar.	Apr.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	229.3	228.1	219.3	2.18	2.32	2.29	2.29	499.8	530.0	501.7	502.2
United States	26.2	24.6	22.6	2.52	2.32	2.53	2.53	66.0	56.9	57.3	57.3
Total Foreign	203.1	203.5	196.6	2.14	2.32	2.26	2.26	433.8	473.1	444.4	445.0
Maj. Foreign Exporters	46.0	46.3	43.4	2.62	2.77	2.78	2.76	120.5	128.4	120.6	119.7
Argentina	5.3	5.1	4.9	1.61	1.75	2.04	2.04	8.5	8.9	10.0	10.0
Australia	11.7	11.3	9.1	1.38	1.44	1.33	1.33	16.2	16.2	12.0	12.1
Canada	13.7	14.2	13.5	1.77	2.20	1.95	1.95	24.3	31.4	26.3	26.3
EC-12	15.3	15.7	15.9	4.69	4.58	4.53	4.48	71.6	71.9	72.3	71.3
Major Importers	98.1	98.1	94.9	2.17	2.40	2.33	2.34	213.3	235.2	221.2	222.3
Brazil	2.8	3.9	3.4	1.54	1.44	1.76	1.81	4.3	5.6	6.0	6.2
China	29.2	29.6	28.9	2.94	3.04	3.01	3.03	85.8	90.0	87.0	87.7
Eastern Europe	10.2	10.5	10.6	3.65	3.73	3.70	3.69	37.1	39.1	39.0	39.0
Egypt	0.5	0.5	0.6	3.76	3.80	4.25	4.25	1.9	1.9	2.4	2.4
Other N. Africa */	5.0	4.6	5.2	1.05	1.17	1.06	1.08	5.2	5.4	5.4	5.6
Japan	0.2	0.2	0.3	3.74	3.56	3.19	3.19	0.9	0.9	0.9	0.9
USSR	50.3	48.7	46.0	1.55	1.89	1.75	1.75	78.1	92.3	80.5	80.5
Other Foreign	59.0	59.1	58.3	1.69	1.85	1.76	1.77	99.9	109.5	102.6	103.0
India	23.6	23.0	22.8	1.87	2.05	2.00	2.00	44.1	47.1	45.6	45.6
Iran	5.7	6.3	6.1	1.00	1.14	0.98	0.98	5.7	7.1	6.0	6.0
Mexico	1.1	1.1	0.9	4.19	4.19	4.11	4.11	4.4	4.5	3.7	3.7
Non-EC W. Europe	0.9	0.9	0.9	4.56	4.58	4.20	4.26	4.1	4.3	4.0	4.0
Pakistan	7.4	7.4	7.7	1.58	1.89	1.58	1.58	11.7	13.9	12.2	12.2
South Africa	2.0	1.9	1.9	0.86	1.21	1.63	1.71	1.7	2.3	3.2	3.3
Turkey	8.6	8.7	8.7	1.48	1.61	1.49	1.49	12.7	14.0	13.0	13.0
Others	9.8	9.9	9.2	1.58	1.65	1.64	1.65	15.5	16.2	15.0	15.2

\*/ Algeria, Libya, Morocco, and Tunisia.

APRIL 1988

FOREIGN PRODUCTION ESTIMATES DIVISION, FAS, USDA



TABLE 5  
Coarse Grains Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---				---Production---			
	Prel. 1985/86	Proj. 1986/87	1987/88	Prel. 1985/86	1987/88 Mar.	Proj. 1986/87	1987/88 Apr.	Prel. 1985/86	1987/88 Mar.	Proj. 1986/87	1987/88 Apr.
TOTAL COARSE GRAINS 1/	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	340.5	336.1	322.7	2.47	2.48	2.44	2.44	841.8	833.9	789.9	786.9
United States	45.5	41.5	35.4	6.04	6.09	6.10	6.10	274.9	252.8	215.7	215.7
Total Foreign	295.0	294.6	287.3	1.92	1.97	1.99	1.99	566.9	581.1	574.2	571.2
Maj. Foreign Exporters	26.2	23.7	23.6	2.43	2.43	2.42	2.43	63.7	57.6	57.6	57.5
Argentina	5.6	4.5	4.4	3.12	2.88	2.92	3.01	17.4	13.0	13.3	13.2
Australia	5.2	4.4	4.8	1.51	1.50	1.46	1.47	7.9	6.6	7.0	7.0
Canada	7.9	7.8	8.0	3.02	3.26	3.24	3.24	23.9	25.5	26.0	26.0
South Africa	4.9	4.9	4.5	1.79	1.61	1.85	1.85	8.9	7.9	8.3	8.3
Thailand	2.5	2.0	2.0	2.26	2.25	1.53	1.51	5.7	4.6	3.0	3.0
Major Importers	109.1	108.4	108.4	2.59	2.67	2.66	2.66	283.1	289.7	288.7	288.9
Eastern Europe	18.6	18.6	18.2	3.53	3.97	3.53	3.53	65.5	73.9	64.2	64.3
EC-12	20.3	19.7	19.0	4.36	4.13	4.32	4.31	88.3	81.3	82.1	82.2
Other W. Europe	3.5	3.4	3.1	3.76	3.65	3.26	3.41	13.1	12.3	10.6	10.7
Mexico	7.8	7.7	7.8	1.88	1.93	1.84	1.87	14.7	14.9	14.5	14.5
USSR	58.5	58.6	59.8	1.71	1.81	1.94	1.94	100.0	105.9	115.8	115.8
Other Major Import. 2/	0.5	0.4	0.5	3.04	3.12	3.18	3.20	1.5	1.4	1.5	1.5
Other Foreign	159.7	162.5	155.2	1.38	1.44	1.46	1.45	220.2	233.8	227.9	224.8
Brazil	13.0	14.0	12.9	1.67	1.95	1.82	1.84	21.7	27.3	23.1	23.7
China	27.0	27.9	28.8	3.05	3.17	3.33	3.25	82.3	88.4	95.3	93.8
India	39.4	39.6	35.8	0.66	0.67	0.64	0.64	25.8	26.6	23.0	23.0
Indonesia	2.4	3.0	2.8	1.77	1.64	1.71	1.71	4.3	5.0	4.8	4.8
Nigeria	9.9	10.2	9.4	0.84	0.84	0.72	0.72	8.3	8.6	6.8	6.8
Philippines	3.5	3.6	3.7	1.11	1.13	1.14	1.14	3.9	4.0	4.3	4.3
Turkey	4.4	4.3	4.3	2.06	2.19	2.14	2.17	9.1	9.4	9.2	9.3
Others	60.1	59.9	57.5	1.08	1.08	1.04	1.03	64.7	64.6	61.4	59.2
BARLEY											
World	81.0	79.9	79.9	2.19	2.28	2.31	2.30	177.2	182.0	184.8	184.1
United States	4.7	4.9	4.1	2.74	2.74	2.83	2.83	12.9	13.3	11.5	11.5
Total Foreign	76.3	75.1	75.9	2.15	2.25	2.29	2.28	164.4	168.7	173.3	172.6
Australia	3.3	2.3	2.4	1.48	1.55	1.38	1.37	4.9	3.6	3.3	3.3
Canada	4.8	4.8	5.0	2.61	3.03	2.85	2.85	12.4	14.6	14.4	14.4
China	3.5	3.4	3.5	1.81	1.82	2.06	1.80	6.2	6.1	6.8	6.3
Eastern Europe	4.4	4.5	4.3	3.71	3.77	3.76	3.76	16.4	16.9	16.0	16.0
EC-12	12.8	12.6	12.2	3.98	3.69	3.85	3.83	50.8	46.5	47.0	46.8
Other W. Europe	1.9	1.8	1.7	3.47	3.39	2.83	2.99	6.6	6.2	5.0	5.0
Turkey	3.4	3.2	3.2	1.94	1.97	1.88	1.88	6.5	6.3	6.0	6.0
USSR	29.1	30.0	31.2	1.60	1.80	1.97	1.97	46.5	53.9	61.6	61.6
Others	13.3	12.5	12.3	1.05	1.18	1.06	1.06	14.0	14.6	13.2	13.1

FOOTNOTES AT END OF TABLE

CONTINUED



TABLE 5 (Continued)  
Coarse Grains Area, Yield, and Production: World and Selected Countries and Regions (Continued)

Country/Region	---Area---			---Yield---				---Production---			
	Prel.	Proj.		Prel.	1987/88 Proj.			Prel.	1987/88 Proj.		
	1985/86	1986/87	1987/88	1985/86	1986/87	Mar.	Apr.	1985/86	1986/87	Mar.	Apr.
CORN	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	129.3	128.8	123.5	3.71	3.70	3.56	3.56	479.8	476.6	439.0	439.0
United States	30.4	28.0	23.9	7.41	7.49	7.49	7.49	225.5	209.6	179.4	179.4
Total Foreign	98.9	100.8	99.5	2.57	2.65	2.61	2.61	254.4	267.1	259.6	259.6
Maj. Foreign Exporters	9.7	8.7	8.0	2.67	2.37	2.42	2.42	25.8	20.7	19.2	19.2
Argentina	3.4	2.9	2.6	3.70	3.19	3.46	3.46	12.4	9.3	9.0	9.0
South Africa	4.0	4.0	3.6	2.00	1.78	2.08	2.08	8.1	7.2	7.5	7.5
Thailand	2.3	1.8	1.8	2.36	2.37	1.56	1.56	5.4	4.3	2.7	2.7
Major Importers	22.3	22.0	21.9	3.75	4.03	3.73	3.76	83.6	88.8	82.0	82.3
Eastern Europe	7.3	7.6	7.4	4.17	5.13	4.03	4.03	30.6	38.9	29.7	29.7
EC-12	3.9	3.9	3.7	6.53	6.45	6.88	6.88	25.7	25.1	25.4	25.7
Other W. Europe	0.2	0.2	0.2	8.30	8.00	7.72	8.09	1.9	1.9	1.8	1.9
Mexico	6.2	6.0	6.0	1.69	1.67	1.62	1.65	10.5	10.0	9.9	9.9
USSR	4.5	4.2	4.5	3.21	2.96	3.29	3.29	14.4	12.5	14.8	14.8
Other Maj. Import. 2/	0.1	0.1	0.1	4.01	4.21	4.33	4.37	0.4	0.4	0.4	0.5
Other Foreign	66.9	70.1	69.7	2.17	2.25	2.28	2.27	145.0	157.6	158.4	158.0
Brazil	12.5	13.5	12.5	1.68	1.96	1.83	1.84	21.0	26.5	22.5	23.0
Canada	1.1	1.0	1.0	6.21	5.95	7.02	7.02	7.0	5.9	7.0	7.0
China	17.7	19.1	20.2	3.61	3.71	3.81	3.76	63.8	70.9	77.0	76.0
Egypt	0.8	0.8	0.9	4.60	4.73	4.82	4.82	3.7	3.9	4.1	4.1
India	5.8	5.9	5.3	1.15	1.27	1.04	1.04	6.6	7.5	5.5	5.5
Indonesia	2.4	3.0	2.8	1.77	1.64	1.71	1.71	4.3	5.0	4.8	4.8
Philippines	3.5	3.6	3.7	1.11	1.13	1.14	1.14	3.9	4.0	4.3	4.3
Zimbabwe	1.3	0.9	1.2	2.03	0.89	1.33	1.33	2.5	0.8	1.6	1.6
Others	21.8	22.2	22.1	1.47	1.49	1.44	1.44	32.0	33.1	31.7	31.8
SORGHUM											
World	48.1	46.0	42.0	1.47	1.40	1.34	1.34	70.5	64.3	58.0	56.1
United States	6.8	5.6	4.3	4.19	4.25	4.39	4.39	28.5	23.8	18.8	18.8
Total Foreign	41.3	40.4	37.7	1.02	1.00	1.01	0.99	42.1	40.5	39.1	37.3
Argentina	1.4	1.0	1.0	3.00	3.10	3.15	3.15	4.2	3.1	3.2	3.2
Australia	0.7	0.8	0.9	1.93	1.54	1.83	1.89	1.4	1.2	1.6	1.7
China	1.9	1.9	1.9	2.90	2.87	3.09	3.09	5.6	5.4	5.8	5.8
India	16.1	15.6	15.0	0.63	0.57	0.57	0.57	10.2	8.9	8.6	8.6
Mexico	1.3	1.4	1.4	2.85	3.19	2.91	2.91	3.7	4.3	4.0	4.0
Nigeria	4.4	4.5	4.3	0.80	0.80	0.67	0.67	3.5	3.6	2.9	2.9
South Africa	0.3	0.3	0.3	1.41	1.53	1.60	1.57	0.4	0.5	0.5	0.5
Sudan	5.6	4.8	3.5	0.64	0.71	0.69	0.46	3.6	3.4	3.1	1.6
Thailand	0.2	0.2	0.2	1.33	1.26	1.25	1.10	0.3	0.3	0.2	0.2
Others	9.3	10.0	9.2	0.98	0.99	0.98	0.96	9.1	9.9	9.3	8.8

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TABLE 5 (Continued)  
Coarse Grains Area, Yield, and Production: World and Selected Countries and Regions (Continued)

Country/Region	---Area---			---Yield---				---Production---			
	Prel.		Proj.	Prel.		1987/88 Proj.	Prel.		1987/88 Proj.		
	1985/86	1986/87	1987/88	1985/86	1986/87	Mar.	Apr.	1985/86	1986/87	Mar.	Apr.
OATS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	25.4	25.0	24.7	1.96	1.90	1.85	1.84	49.7	47.5	45.8	45.5
United States	3.3	2.8	2.8	2.28	2.02	1.94	1.94	7.6	5.6	5.4	5.4
Total Foreign	22.1	22.2	21.9	1.91	1.89	1.84	1.83	42.2	41.9	40.3	40.1
USSR	12.6	13.2	12.8	1.63	1.66	1.60	1.60	20.5	21.9	20.5	20.5
Maj. Foreign Exporters	3.2	3.3	3.5	1.93	2.04	1.96	1.97	6.1	6.7	6.9	6.9
Argentina	0.4	0.4	0.5	1.00	1.00	1.30	1.30	0.4	0.4	0.7	0.7
Australia	1.1	1.1	1.4	1.25	1.36	1.32	1.36	1.3	1.6	1.8	1.9
Canada	1.3	1.3	1.3	2.17	2.53	2.37	2.37	2.7	3.3	3.0	3.0
Sweden	0.4	0.5	0.4	3.75	3.26	3.65	3.63	1.7	1.5	1.5	1.4
Other Foreign	6.3	5.8	5.6	2.48	2.31	2.30	2.26	15.5	13.3	12.9	12.6
China	0.6	0.6	0.6	1.12	1.17	1.20	1.20	0.7	0.7	0.7	0.7
Eastern Europe	1.6	1.5	1.4	2.76	2.76	2.83	2.82	4.5	4.2	4.0	4.0
East Germany	0.2	0.2	0.2	4.19	4.09	4.18	4.18	0.7	0.7	0.7	0.7
Poland	1.0	0.9	0.9	2.70	2.70	2.87	2.87	2.7	2.5	2.5	2.5
EC-12	2.2	1.9	1.8	3.31	2.95	3.12	2.99	7.4	5.6	5.6	5.3
France	0.4	0.3	0.3	4.24	3.27	4.29	3.72	1.8	1.0	1.4	1.0
West Germany	0.7	0.6	0.6	4.70	4.44	4.42	4.29	3.3	2.7	2.4	2.4
Finland	0.4	0.4	0.4	2.96	2.92	1.79	1.96	1.2	1.2	0.7	0.7
Norway	0.1	0.1	0.1	3.84	3.44	4.23	4.23	0.5	0.5	0.6	0.6
Others	1.3	1.3	1.3	1.02	1.02	1.01	1.01	1.3	1.3	1.3	1.3
RYE											
World	16.0	14.8	14.7	2.01	2.10	2.11	2.11	32.2	31.0	31.0	31.0
United States	0.3	0.3	0.3	1.81	1.81	1.82	1.82	0.5	0.5	0.5	0.5
Total Foreign	15.7	14.5	14.4	2.02	2.11	2.11	2.12	31.7	30.5	30.5	30.5
USSR	9.5	8.7	8.5	1.65	1.74	1.76	1.76	15.7	15.2	15.0	15.0
Maj. Foreign Exporter											
Canada	0.4	0.3	0.3	1.61	1.93	1.58	1.58	0.6	0.6	0.5	0.5
Other Foreign											
Eastern Europe	4.2	3.9	4.0	2.66	2.73	2.74	2.74	11.1	10.6	11.0	11.0
East Germany	0.7	0.7	0.7	3.63	3.54	3.47	3.47	2.5	2.4	2.4	2.4
Poland	3.1	2.8	3.0	2.47	2.57	2.63	2.63	7.6	7.3	7.8	7.8
Czechoslovakia	0.2	0.2	0.2	3.41	3.49	3.13	3.13	0.6	0.5	0.5	0.5
EC-12	1.0	1.0	1.0	3.15	3.03	2.90	2.94	3.2	3.0	3.0	3.0
Denmark	0.1	0.1	0.1	4.45	4.55	3.79	3.79	0.6	0.5	0.5	0.5
West Germany	0.4	0.4	0.4	4.30	4.28	3.91	3.91	1.9	1.8	1.6	1.6
Others	0.6	0.5	0.5	1.73	1.84	1.72	1.80	1.1	1.0	1.1	1.0

1/ Total of barley, corn, sorghum, oats, and rye shown below plus millet and mixed grain.

2/ Japan, Republic of Korea, and Taiwan.



TABLE 6

## Rice Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---	---Yield---	---Production---	---Milling Rate---	---Production---
			(Rough Basis)		(Milled Basis)
	Prel. Proj.	Prel. 1987/88 Proj.	Prel. 1987/88 Proj.	Prel. 1987/88 Proj.	Prel. 1987/88 Proj.
: 1985/86 1986/87 1987/88	: 1985/86 1986/87 Mar. Apr.	: 1985/86 1986/87 Mar. Apr.	: 1985/86 1986/87 Mar. Apr.	: 1985/86 1986/87 Mar. Apr.	: 1985/86 1986/87 Mar. Apr.
	---Million Hectares---	---Metric Tons Per Hectare---	---Million Metric Tons---	---In Percent---	---Million Metric Tons---
World	: 144.9 145.1 141.9	: 3.24 3.11 3.14	: 468.9 466.8 442.8	: 68.1 68.1 68.2	: 319.1 317.8 301.9
United States	: 1.0 1.0 0.9	: 6.07 6.14 6.14	: 6.1 6.0 5.8	: 70.8 70.2 70.0	: 4.3 4.2 4.1
Total Foreign	: 143.9 144.1 141.0	: 3.22 3.09 3.12	: 462.7 460.8 437.0	: 68.0 68.1 68.2	: 314.8 313.6 297.9
Maj. Foreign Exporters	: 16.3 16.4 15.3	: 2.28 2.23 2.09	: 37.2 36.5 31.9	: 64.8 64.9 64.7	: 24.1 23.7 20.6
Burma	: 4.6 4.7 4.4	: 2.86 2.79 2.79	: 13.1 12.4 12.4	: 62.5 62.5 62.5	: 8.2 7.8 7.8
Pakistan	: 1.9 2.1 1.9	: 2.35 2.59 2.53	: 4.4 5.2 4.7	: 66.7 66.7 66.7	: 2.9 3.5 3.1
Thailand	: 9.8 9.7 9.0	: 2.00 1.95 1.64	: 19.7 18.9 14.8	: 66.0 66.0 66.0	: 13.0 12.5 9.8
Major Importers	: 13.0 13.0 12.9	: 4.01 3.99 3.93	: 52.0 51.8 51.2	: 68.4 68.3 68.5	: 35.5 35.4 35.0
EC-12	: 0.3 0.3 0.3	: 6.19 5.79 5.75	: 2.0 1.9 1.9	: 67.2 66.7 67.3	: 1.3 1.3 1.3
Indonesia	: 9.9 9.9 9.8	: 3.94 3.94 3.92	: 39.0 39.0 38.7	: 68.0 68.0 68.0	: 26.5 26.5 26.3
Nigeria	: 0.7 0.7 0.7	: 1.44 1.43 1.32	: 1.0 0.9 0.9	: 66.5 66.5 66.5	: 0.7 0.6 0.6
Republic of Korea	: 1.2 1.2 1.3	: 6.35 6.37 6.02	: 7.9 7.9 7.6	: 71.6 71.2 72.3	: 5.6 5.6 5.5
Other Maj. Import. */	: 0.8 0.9 0.9	: 2.66 2.38 2.33	: 2.1 2.1 2.1	: 65.5 65.5 65.5	: 1.4 1.4 1.4
Other Foreign	: 114.7 114.8 112.7	: 3.26 3.25 3.13	: 373.5 372.5 354.0	: 68.3 68.3 68.4	: 255.1 254.5 242.2
Australia	: 0.1 0.1 0.1	: 6.42 5.72 6.91	: 0.7 0.5 0.7	: 71.5 71.6 71.5	: 0.5 0.4 0.5
Bangladesh	: 10.4 10.6 10.3	: 2.17 2.18 2.05	: 22.6 23.1 22.1	: 66.7 66.7 66.7	: 15.0 15.4 14.8
Brazil	: 5.8 6.0 6.0	: 1.77 1.74 1.70	: 10.3 10.4 10.2	: 68.0 68.0 68.0	: 7.0 7.1 6.9
China	: 32.1 32.3 32.1	: 5.26 5.34 5.46	: 168.6 172.2 175.0	: 70.0 70.0 70.0	: 118.0 120.6 122.5
India	: 41.1 40.8 39.7	: 2.33 2.22 1.86	: 95.7 90.6 73.5	: 66.7 66.7 66.7	: 63.8 60.4 49.0
Japan	: 2.3 2.3 2.1	: 6.22 6.32 6.19	: 14.6 14.6 13.3	: 72.8 72.8 72.8	: 10.6 10.6 9.7
Philippines	: 3.4 3.4 3.3	: 2.67 2.64 2.58	: 9.1 9.0 8.5	: 65.0 65.0 65.0	: 5.9 5.8 5.5
USSR	: 0.7 0.6 0.7	: 3.83 4.24 4.15	: 2.6 2.6 2.7	: 65.0 65.0 65.0	: 1.7 1.7 1.8
Vietnam	: 5.7 5.7 5.7	: 2.63 2.70 2.59	: 15.0 15.4 14.6	: 65.0 65.0 65.0	: 9.8 10.0 9.5
Others	: 13.0 13.0 12.8	: 2.64 2.62 2.58	: 34.4 34.0 33.4	: 66.1 66.3 66.3	: 22.8 22.5 22.1

\*/ Hong Kong, Iran, Ivory Coast, and Saudi Arabia.

APRIL 1988

FOREIGN PRODUCTION ESTIMATES DIVISION, FAS, USDA



TABLE 7  
Oilseeds Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---				---Production---			
	Prel.		Proj.	Prel.		1987/88 Proj.	Prel.		1987/88 Proj.		
	1985/86	1986/87	1987/88	1985/86	1986/87	Mar.	Apr.	1985/86	1986/87	Mar.	Apr.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SOYBEANS											
-----											
World	52.04	51.44	53.37	1.86	1.91	1.90	1.90	96.94	98.13	101.43	101.32
United States	24.92	23.59	22.84	2.29	2.24	2.27	2.27	57.11	52.80	51.84	51.84
Total Foreign	27.12	27.85	30.53	1.47	1.63	1.63	1.62	39.82	45.33	49.59	49.48
Maj. Foreign Exporters	12.77	12.78	14.60	1.68	1.92	1.88	1.85	21.40	24.60	27.50	27.00
Argentina	3.32	3.51	4.20	2.20	2.08	2.14	2.14	7.30	7.30	9.00	9.00
Brazil	9.45	9.27	10.40	1.49	1.87	1.78	1.73	14.10	17.30	18.50	18.00
Other Foreign	14.35	15.07	15.93	1.28	1.38	1.39	1.41	18.42	20.73	22.09	22.48
Canada	0.41	0.38	0.46	2.50	2.50	2.75	2.75	1.01	0.96	1.27	1.27
China	7.72	8.30	8.39	1.36	1.40	1.41	1.44	10.51	11.61	11.80	12.09
Eastern Europe	0.52	0.50	0.55	1.12	1.64	1.24	1.25	0.58	0.82	0.69	0.69
India	1.34	1.39	1.40	0.76	0.60	0.71	0.71	1.02	0.84	1.00	1.00
Indonesia	0.97	0.92	1.00	0.98	0.98	0.95	1.00	0.95	0.90	0.95	1.00
Mexico	0.37	0.34	0.39	1.92	1.94	1.88	1.92	0.71	0.66	0.75	0.75
Paraguay	0.55	0.53	0.62	1.09	1.79	1.71	1.63	0.60	0.95	1.05	1.00
USSR	0.74	0.74	0.78	0.63	0.95	0.80	0.90	0.47	0.70	0.62	0.70
Others	1.74	1.97	2.34	1.48	1.67	1.71	1.70	2.58	3.28	3.97	3.98
COTTONSEED											
-----											
World	31.72	30.17	32.34	0.97	0.90	0.95	0.95	30.63	27.23	30.57	30.57
United States	4.14	3.43	4.07	1.16	1.01	1.29	1.29	4.79	3.45	5.26	5.26
Total Foreign	27.58	26.75	28.27	0.94	0.89	0.89	0.90	25.84	23.79	25.30	25.31
China	5.14	4.31	4.91	1.37	1.40	1.45	1.45	7.05	6.02	7.11	7.11
India	7.58	7.28	7.50	0.48	0.44	0.41	0.41	3.65	3.22	3.04	3.04
Pakistan	2.37	2.51	2.51	1.04	1.05	1.14	1.17	2.47	2.64	2.88	2.94
USSR	3.32	3.48	3.48	1.54	1.40	1.28	1.28	5.10	4.87	4.45	4.45
Others	9.17	9.18	9.86	0.83	0.77	0.79	0.79	7.57	7.04	7.84	7.77
PEANUTS											
-----											
World	17.98	18.44	17.41	1.11	1.11	1.09	1.10	19.99	20.44	18.91	19.11
United States	0.59	0.62	0.63	3.15	2.70	2.62	2.62	1.87	1.68	1.63	1.64
Total Foreign	17.38	17.82	16.78	1.04	1.05	1.03	1.04	18.12	18.76	17.29	17.47
Brazil	0.16	0.14	0.11	1.34	1.38	1.57	1.57	0.22	0.20	0.17	0.17
China	3.32	3.25	3.06	2.01	1.81	1.96	2.02	6.66	5.88	6.00	6.17
India	7.12	7.15	6.10	0.72	0.85	0.71	0.71	5.12	6.06	4.35	4.35
Senegal	0.61	0.81	0.80	0.97	1.04	0.94	0.94	0.59	0.84	0.75	0.75
South Africa	0.22	0.16	0.18	0.50	0.81	0.80	0.80	0.11	0.13	0.14	0.14
Sudan	0.48	0.55	0.55	0.73	0.73	0.73	0.73	0.35	0.40	0.40	0.40
Others	5.48	5.75	5.99	0.93	0.91	0.91	0.92	5.07	5.25	5.48	5.50

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TABLE 7 (Continued)  
Oilseeds Area, Yield, and Production: World and Selected Countries and Regions (Continued)

Country/Region	---Area---			---Yield---				---Production---			
	Prel.	Proj.		Prel.	1987/88	Proj.		Prel.	1987/88	Proj.	
	1985/86	1986/87	1987/88	1985/86	1986/87	Mar.	Apr.	1985/86	1986/87	Mar.	Apr.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SUNFLOWERSEED											
-----											
World	15.78	13.98	14.79	1.23	1.36	1.38	1.38	19.49	18.95	20.43	20.40
United States	1.15	0.79	0.72	1.24	1.53	1.65	1.65	1.43	1.21	1.18	1.18
Total Foreign	14.63	13.19	14.07	1.23	1.35	1.36	1.37	18.06	17.74	19.24	19.22
Argentina	3.05	1.74	2.15	1.35	1.27	1.30	1.30	4.10	2.20	2.80	2.80
China	1.47	1.04	0.95	1.18	1.48	1.40	1.42	1.73	1.54	1.40	1.35
EC-12	1.99	2.13	2.32	1.38	1.53	1.61	1.61	2.75	3.26	3.73	3.73
East Europe	1.21	1.33	1.39	1.67	2.15	1.72	1.72	2.02	2.86	2.38	2.39
USSR	4.05	3.85	4.10	1.30	1.37	1.49	1.49	5.26	5.26	6.10	6.10
Others	2.86	3.10	3.16	0.77	0.85	0.90	0.90	2.19	2.63	2.83	2.85
RAPESEED											
-----											
World	14.54	14.59	16.16	1.28	1.33	1.40	1.42	18.57	19.45	22.93	22.94
Total Foreign	14.54	14.59	16.16	1.28	1.33	1.40	1.42	18.57	19.45	22.93	22.94
Canada	2.78	2.64	2.67	1.26	1.43	1.44	1.44	3.50	3.79	3.85	3.85
China	4.49	4.92	5.29	1.25	1.20	1.27	1.27	5.61	5.88	6.73	6.73
EC-12	1.27	1.27	1.86	2.87	2.91	3.24	3.18	3.65	3.69	6.02	5.92
East Europe	0.91	0.95	0.94	2.19	2.41	2.30	2.33	1.99	2.28	2.16	2.18
India	3.98	3.73	4.10	0.67	0.71	0.68	0.71	2.68	2.64	2.70	2.90
Others	1.10	1.09	1.30	1.04	1.08	0.92	1.05	1.15	1.18	1.47	1.36
FLAXSEED											
-----											
World	4.50	4.36	4.20	0.52	0.62	0.56	0.56	2.36	2.70	2.35	2.35
United States	0.24	0.28	0.19	0.89	1.06	1.01	1.01	0.21	0.29	0.19	0.19
Total Foreign	4.26	4.08	4.01	0.50	0.59	0.54	0.54	2.15	2.41	2.17	2.17
Argentina	0.69	0.75	0.69	0.67	0.83	0.80	0.80	0.46	0.62	0.55	0.55
Canada	0.74	0.76	0.62	1.22	1.36	1.28	1.28	0.90	1.03	0.79	0.79
India	1.42	1.23	1.35	0.27	0.28	0.30	0.30	0.38	0.34	0.40	0.40
USSR	1.10	1.05	1.05	0.18	0.22	0.22	0.22	0.20	0.23	0.23	0.23
Others	0.31	0.30	0.31	0.65	0.62	0.64	0.64	0.20	0.19	0.20	0.20
MAJOR OILSEEDS TOTAL	136.55	132.97	138.25	1.38	1.41	1.42	1.42	187.96	186.90	196.62	196.69
COPRA	--	--	--	--	--	--	--	5.35	4.78	4.48	4.48
PALM KERNEL	--	--	--	--	--	--	--	2.56	2.52	2.65	2.65
TOTAL OILSEEDS	--	--	--	--	--	--	--	195.88	194.20	203.75	203.82
PALM OIL *	--	--	--	--	--	--	--	8.11	8.06	8.37	8.37

\* Not included in total oilseeds.



TABLE 8  
Cotton Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---				---Production---			
	Prel.	Proj.		Prel.	1987/88	Proj.		Prel.	1987/88	Proj.	
	1985/86	1986/87	1987/88	1985/86	1986/87	Mar.	Apr.	1985/86	1986/87	Mar.	Apr.
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	31.9	30.2	32.3	544	508	532	533	79.6	70.5	79.2	79.2
United States	4.1	3.4	4.1	706	618	788	789	13.4	9.7	14.7	14.7
Total Foreign	27.7	26.8	28.3	520	494	496	496	66.2	60.7	64.5	64.5
Maj. Foreign Exporters	12.8	12.1	12.8	766	747	754	759	45.2	41.4	44.4	44.5
Australia	0.2	0.1	0.2	1458	1452	1306	1306	1.2	1.0	1.2	1.2
Central America 1/	0.2	0.1	0.1	675	730	751	778	0.6	0.4	0.4	0.4
China	5.1	4.3	4.9	805	824	851	851	19.0	16.3	19.2	19.2
Egypt	0.5	0.4	0.4	959	895	845	856	2.0	1.8	1.6	1.6
Mexico	0.2	0.2	0.2	992	914	947	947	1.0	0.6	1.0	1.0
Pakistan	2.4	2.5	2.5	522	527	572	585	5.7	6.1	6.6	6.8
Sudan	0.3	0.4	0.3	430	431	435	492	0.7	0.7	0.7	0.7
Turkey	0.7	0.6	0.6	785	885	897	897	2.4	2.4	2.4	2.4
USSR	3.3	3.5	3.5	839	762	700	700	12.8	12.2	11.2	11.2
Major Importers 2/	0.3	0.3	0.3	796	926	805	805	1.2	1.4	1.2	1.2
Other Foreign	14.6	14.4	15.2	296	272	271	269	19.8	17.9	18.9	18.7
Argentina	0.3	0.3	0.5	372	318	359	359	0.5	0.5	0.8	0.8
Brazil	2.3	2.2	2.3	362	303	327	314	3.8	3.0	3.4	3.2
India	7.6	7.3	7.5	240	222	203	203	8.4	7.4	7.0	7.0
Syria	0.2	0.1	0.1	952	874	847	847	0.7	0.6	0.5	0.5
Others	4.2	4.4	4.8	330	315	326	325	6.4	6.4	7.2	7.2

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

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NOTE: The table below presents a 6-year record of the differences between the April projections and the final estimates. Using world wheat production as an example, changes between the April projections and the final estimates have averaged 3.3 million tons (0.7 percent) ranging from -6.8 to 6.5 million tons. The April projection has been below the final estimate two times and above four times.

TABLE 9  
RELIABILITY OF APRIL PRODUCTION PROJECTIONS

COMMODITY AND REGION	: DIFFERENCES BETWEEN PROJECTION AND FINAL ESTIMATE. 1981/82-86/87 1/							
	: AVERAGE	: AVERAGE	: Difference		: BELOW	: ABOVE		
	: PERCENT		: ----MILLION METRIC TONS----		: NUMBER OF YEARS	: 2/		
WHEAT	:	:	:	:	:	:	:	:
WORLD	: 0.7	: 3.3	-6.8	6.5	: 2	4		
U.S.	: 0.1	: 0.0	-0.1	0.1	: 1	1		
FOREIGN	: 0.8	: 3.3	-6.8	6.5	: 2	4		
COARSE GRAINS 3/	:	:	:	:	:	:	:	:
WORLD	: 0.5	: 3.8	-7.1	4.3	: 3	3		
U.S.	: 0.2	: 0.2	-0.1	1.3	: 2	1		
FOREIGN	: 0.7	: 4.0	-7.1	4.3	: 3	3		
RICE (MILLED)	:	:	:	:	:	:	:	:
WORLD	: 1.3	: 3.8	-9.0	1.3	: 5	1		
U.S.	: 0.4	: 0.0	0.0	0.1	: 0	1		
FOREIGN	: 1.3	: 3.8	-9.0	1.3	: 5	1		
SOYBEANS	:	:	:	:	:	:	:	:
WORLD	: 1.8	: 1.6	-2.5	1.7	: 3	3		
U.S.	: 1.6	: 0.8	-1.1	1.8	: 1	4		
FOREIGN	: 2.3	: 0.9	-2.2	0.0	: 6	0		
COTTON	:	:	: ----MILLION 480-LB. BALES----		:	:	:	:
WORLD	: 1.0	: 0.9	-3.0	0.1	: 5	1		
U.S.	: 0.1	: 0.0	0.0	0.1	: 0	1		
FOREIGN	: 1.3	: 0.9	-3.0	0.1	: 5	1		
UNITED STATES	:	:	: ----MILLION BUSHEL----		:	:	:	:
=====	:	:	:	:	:	:	:	:
CORN	: 0.2	: 6	0	38	: 0	1		
SORGHUM	: 0.1	: 1	0	4	: 0	1		
BARLEY	: 0.4	: 2	-2	11	: 2	1		
OATS	: 0.1	: 1	-2	0	: 2	0		

1/ The final estimate for 1981/82-1985/86 is defined as the first November estimate following the marketing year and for 1986/87 last month's estimate.

2/ May not total six if projection was the same as the final estimate.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

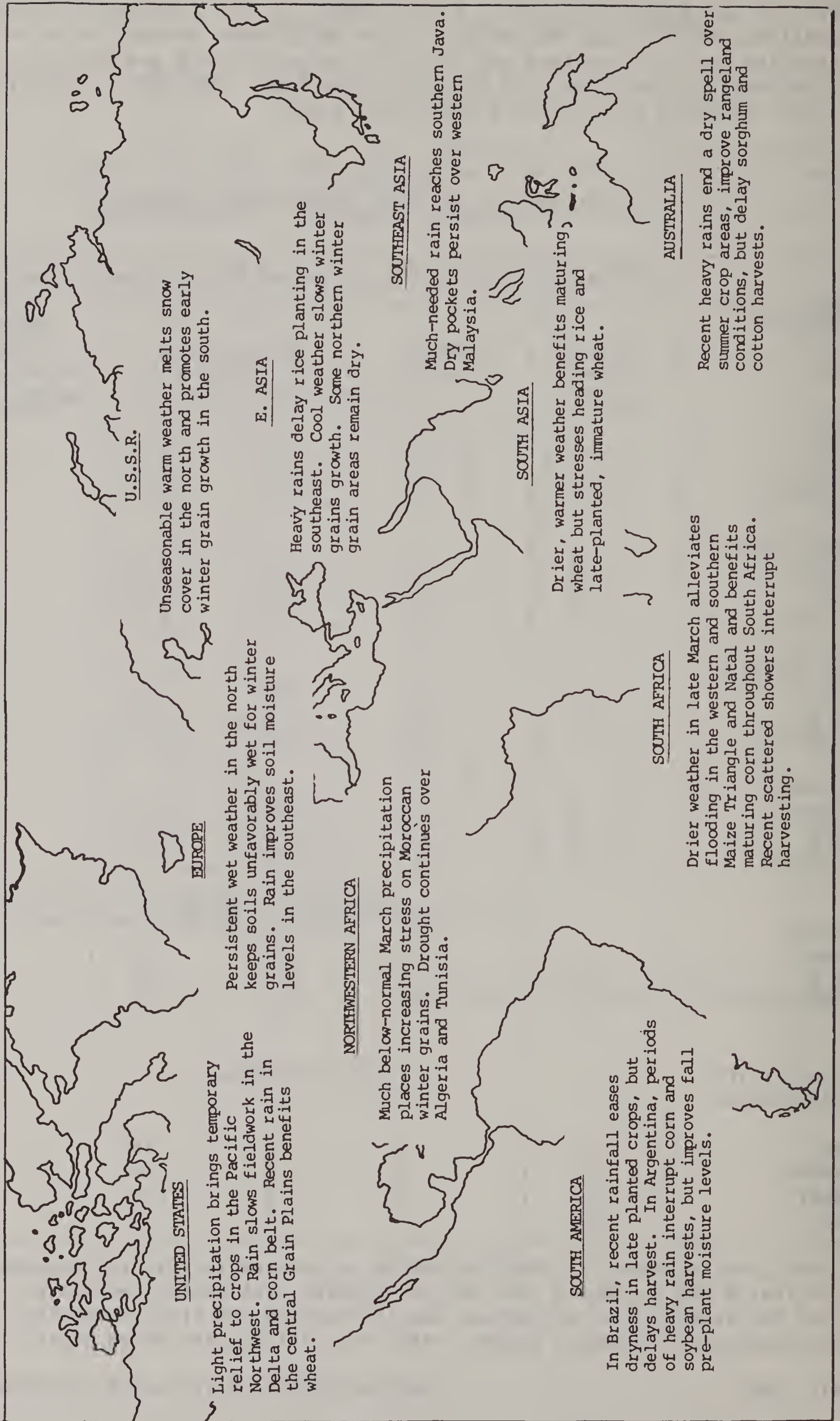
APRIL 1988

FOREIGN PRODUCTION ESTIMATES DIVISION. FAS. USDA



# WORLD AGRICULTURAL WEATHER HIGHLIGHTS

Date APRIL 11, 1988  
NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY





## WEATHER BRIEFS

**Brazil** continued to receive below normal rainfall in northwest Rio Grande do Sul where dry conditions delayed some soybean plantings until January. Above normal temperatures ranging into the upper 30's Celsius further stressed late planted soybeans during flowering and early pod filling. These high temperatures were widespread across southern Brazil but likely did not have a significant impact on the majority of the crops nearing harvest.

**Sri Lanka** received some rainfall during March following persistent dryness since November. Total accumulations for the season remained well below normal. Crop prospects remain unfavorable but have likely stabilized.

**Ethiopia** experienced a shortfall of rain during February and March as the secondary rainy season appeared to falter. Reports from Addis Ababa indicate that lighter than normal rainfall in the western highlands of Ethiopia has stressed crops. Crops grown during this secondary rainy season form a significant part of the food and forage supplies in local areas. The Ethiopian Highlands are the headwaters of the Blue Nile River, a major tributary of the Nile in Sudan and Egypt. The rain shortfall in Ethiopia bodes ill for irrigation supplies and hydroelectricity generation in Sudan and Egypt. Above normal rains during the main rainy season beginning in late May or early June will be critical for good crop growth in Ethiopia, Sudan, and Egypt.

**Canada** experienced an unusually dry and mild winter in the prairie provinces, limiting soil moisture reserves for grain and oilseed planting this spring. The mild winter may also have allowed an above normal survival rate for various crop pests and disease organisms. Timely rainfall in the prairie provinces will be needed for good seed germination. To the east, the predominantly corn growing regions of Ontario and Quebec have good soil moisture reserves due to near normal precipitation since last fall.



## PRODUCTION BRIEFS

### NORTHWEST AFRICA: DESERT LOCUSTS THREATEN CEREAL CROPS

Wheat and barley crops in Morocco, Algeria, Tunisia, and Libya are being threatened by swarms of desert locusts coming from remote breeding areas of northern Mauritania. Anomalous winter rains in the Sahel created very favorable conditions for locust breeding. Control campaigns are in progress with the aim of preventing large scale migration into the main cereal production regions of the Maghreb. No significant damage to cereals has yet occurred. If control efforts are not successful at reducing the new breeding populations, there is a threat of a large scale May migration south across the Sahara coincident with cereal planting in the Sahelian countries. Some specialists feel that control efforts will fail unless the highly effective insecticide dieldrin is used.

### MALAYSIA: OIL PALM AREA INCREASES

According to the U.S. agricultural attache in Kuala Lumpur, Malaysia's palm oil acreage increased approximately by 86,000 hectares or 5 percent in 1987. This is about 34 percent less than was added in 1986. Total oil palm area reached 1.69 million hectares at the end of 1987. Private estates make up slightly less than half of the total while the Federal Land Development Authority (FELDA) now accounts for about 30 percent of total planted area. State schemes, other development schemes, and smallholders comprise the rest of the oil palm area. In 1987, FELDA registered the greatest increase in new plantings with 26,500 hectares. The private sector added 24,600 additional hectares.

#### MALAYSIAN OIL PALM AREA (Thousand Hectares)

	1984	1985	1986	1987
PRIVATE ESTATES	676	755	768	793
FELDA 1/	402	437	470	497
STATE SCHEMES	116	96	114	122
SMALLHOLDERS	100	117	123	136
OTHERS 2/	55	63	124	138
TOTAL	1,349	1,468	1,599	1,686

1/ Federal Land Development Authority.

2/ Rubber Industry Smallholders Development Authority and  
Federal Land Consolidation and Rehabilitation Authority.

## MALAYSIA: COCONUT AREA REMAINS STABLE

The area devoted to coconut production in Malaysia has increased slowly since the late 1970's. In line with the national agricultural policy, the government is not encouraging the expansion of coconut area, except to supply the fresh fruit market and to provide shade for the cocoa crop. Most of the new planting is attributed to intercropping with cocoa in peninsular Malaysia and Sarawak, a practice that remains limited in Sabah, which is the country's main cocoa producing area. Over 90 percent of the coconut area belongs to smallholders. The government encourages the grazing and intercropping of coconut holdings in the face of low world prices for tropical oils.

### MALAYSIAN COCONUT AREA IN 1987 (Thousand Hectares)

		Peninsular Malaysia	Sabah	Sarawak	All Malaysia
Estate	:	24	4	---	28
Smallholder	:	176	54	57	287
TOTAL	:	200	58	57	315

## IRAQ: POULTRY INDUSTRY UNDERGOES RESTRUCTURING

The U.S. Agricultural Trade Officer in Baghdad reports that Iraq's poultry industry is going through a restructuring process as part of the government's policy to convert more of the agricultural sector to private ownership. During the past 9 months, as part of that policy the Ministry of Agriculture has sold its feed mills, hatcheries, slaughter houses, and egg production facilities. Broiler production units were generally not part of that sale because they were privately owned even before the new policy was implemented. Under the mostly state owned system, many difficulties were experienced relative to coordination between input supplies and needs. Despite those problems the sector was still able to make good progress, with boiler meat output increasing from 58,000 tons in 1980 to 200,000 tons in 1986 while egg production grew from one billion eggs to 1.2 billion eggs over the same period.

The restructured system will be more privately owned and is expected to lead to more vertical integration which should eliminate many of the former problems with coordination. However, the government will retain responsibility for importation of feedstuffs, veterinarian supplies, and hatching eggs. According to reports, the restructured system has already resulted in better supplies of domestic poultry meat in city markets. In the long run, restructuring of the poultry industry is expected to result in increased output of poultry products which in turn will lead to a reduction of poultry product imports and a relative increase in imports of feedstuffs.



#### EGYPT: COTTON AREA DECLINES DESPITE GOVERNMENT SUBSIDIES

The Egyptian Government regulates and subsidizes cotton production because of its value in providing much needed foreign currency. Producers are eligible for low interest loans, free seedbed preparation, and low cost inputs. However, in the past few years these incentive programs have not been able to compensate for artificially low market prices. Farmers are switching to potentially more profitable feed crops, even at the risk of fines or imprisonment. Area declines have continued since the latter part of the 1970's.

#### TAIWAN: SLOWER GROWTH FOR SHRIMP FARMING IN THE FUTURE

The American Institute in Taiwan reports that 1987 was a bad year for Taiwan's aquaculture industry, because shrimp farming, the leading component of the industry, suffered from disease, small sized harvested shrimp, and other problems related to pollution and ground water. In recognition of the fact that many of the industry's problems do not have a short-term solution, Taiwanese authorities have reversed their policy of strongly promoting growth of shrimp farms and are now suggesting that the industry retrench 2 to 3 percent in 1988. Prior to 1987, shrimp were Taiwan's second leading agricultural export, after pork, with 1986 exports valued at over \$0.5 billion. Further, shrimp farming produced the greatest gross profit per hectare, reported to be as high as US \$29,000, roughly 20 times that of rice. Taiwan's aquaculture is estimated to cover 65,000 hectares of pond area and to provide full and part-time employment to about 90,000 people.

#### FINLAND: SET-ASIDE PROGRAM RENEWED FOR SECOND YEAR

Excluding this year's poor crop, Finland has always been self-sufficient in barley, and has frequently had an exportable surplus. Since barley requires a relatively short growing period it is better suited to Finland's agronomic conditions than other grains, and normally accounts for around 50 percent of Finland's grain area and production. In an effort at controlling surplus production, the government of Finland introduced a voluntary set aside program in 1987. Participating farmers were required to fallow at least 25 percent of their arable land for one year to qualify for payments of between US\$336-492 per hectare. The program set aside 68,500 hectares and has been renewed for 1988/89; an estimated 50,000 hectares is expected to be fallowed under the program in the coming year.

#### SWEDEN: "ADJUSTMENT 90" PROGRAM INTRODUCED TO CUT GRAIN PRODUCTION

Faced with depressed world grain prices in recent years, the government of Sweden has resorted to costly export subsidies to dispose of its growing surplus grain production according to the U.S. Agricultural Attache in Stockholm. In 1987, the Ministry of Agriculture introduced a voluntary 1-year fallow program designed to reduce the surplus area of cultivated land, which is forecast to reach 400,000 hectares by 1990 and 800,000-900,000 hectares by the turn of the century. Farmers enrolled 125,000 hectares of arable land

under the scheme, which together with a smaller grain crop brought about by unfavorable weather throughout the season, resulted in an estimated US \$102 million reduction in export subsidies. This scheme was replaced in the fall of 1987 by the Adjustment 90 program. By 1990, the government aims to divert 300,000 hectares of grain land to alternative uses, which do not contribute to export surpluses or the degradation of the environment. As a result of Adjustment 90, an estimated 235,000 hectares of grain land will be dedicated to alternative uses in 1988/89, resulting in a reduction of approximately US \$64 million in export subsidies.

#### UNITED STATES: PROSPECTIVE PLANTING RESULTS RELEASED

The National Agricultural Statistics Service reported in the March 31, 1988, Prospective Plantings report that the intended oilseeds area (soybeans, cotton, peanuts, sunflower, and flaxseed) is expected to total 29.7 million hectares, up 2 percent from last year. Area planted to food grains (wheat, rice, and rye) is down slightly from 1987 to 28.5 million hectares and intended feed grains area is down 2 percent to 42.2 million hectares.

If reported intentions are realized, soybean area will be the second lowest since 1976 at 23.5 million hectares. All area intended for rice is estimated at 1.13 million hectares, an increase of 19 percent over last year and the largest area since 1984. Durum wheat area is expected to increase by 12 percent to 1.51 million hectares, the highest level since 1982. As in previous years, some oats will be seeded as a cover crop on government program acres; therefore, this year's 9-percent decrease in intended oats area does not necessarily imply that the area harvested for grain will also change by that amount. Total cotton area is expected to total 4.69 million hectares, up 11 percent from last year.

#### CANADA: STATISTICS CANADA RELEASES 1988 PLANTING INTENTIONS REPORT

The Statistics Canada planting intentions report for principal field crops, released on March 23, indicates that farmers in the prairie provinces are planning to shift large areas out of barley and wheat into oats and rapeseed. While total wheat area is expected to decline for the second year to 13.2 million hectares, down 2 percent from last year's harvested area, durum area is projected up 4 percent from last year to a new record of 2.27 million hectares. Barley area is placed at the lowest level since 1979, down 15 percent from last year to 4.48 million hectares. The area sown to rapeseed is projected to reach a record 3.36 million hectares, up 26 percent from last year. Soybean area is also expected to reach a new record, surpassing last year's level by 4 percent at 469,000 hectares. Oat seedings are expected to be up 13 percent to 1.82 million hectares, and corn area is projected down 3 percent to 949,000 hectares. Actual planted area may differ from intended area for a number of reasons, including weather-related developments, initial prices, crop rotation requirements, and changes in the market outlook.



CANADIAN GRAIN AND OILSEED  
PRODUCTION OVERVIEW

Canada is one of the world's leading producers of barley, oats, rapeseed, and flaxseed, and also produces significant quantities of wheat, mixed grains, rye, and corn. Production of wheat, barley, oats, rye, rapeseed, and flaxseed is concentrated in the "prairie" provinces of Saskatchewan, Alberta, and Manitoba and the Peace River valley region, extending from western Alberta to eastern British Columbia. Production alternatives in the prairie provinces are limited by a short growing season, poorly timed rainfall, drought, and long, cold winters. The province of Ontario, with its milder climate and longer growing season, produces most of Canada's corn, mixed grains, winter wheat, and soybeans.

Since 1975, Canadian wheat production has increased 54 percent from 17.1 to 26.3 million tons due primarily to a 43-percent expansion in area. During this period, wheat yields improved only 8 percent and displayed the volatility characteristic of the uncertain growing conditions on the prairies, ranging from a low of 1.61 tons per hectare to a record high of 2.2 tons per hectare. Barley production has grown 51 percent during the period since 1975, but most of this increase is due to significant improvement in yields; barley area for the period increased only 13 percent. Canadian corn production has nearly doubled in the past 13 years, increasing from 3.6 to 7.0 million tons as area expanded 57 percent and yields improved from 5.7 to 7.0 tons per hectare. During this same period, production of the other coarse grains (oats, rye, and mixed grains) has declined 33 percent, due to a 44-percent erosion in area, which was only partially offset by an 18-percent improvement in yields.

Oilseed production in 1987 was nearly 6.0 million tons, more than twice that produced in 1975. The increase can be attributed in equal parts to higher area and yields, both up about 50 percent since 1975. In 1987, record output was achieved in rapeseed and soybeans due to record yields and additional area. Flaxseed output declined nearly 25 percent in 1987 as farmers adjusted to high stocks and low prices. Early indications are that rapeseed area will increase significantly this season, while soybean and flaxseed area will only increase marginally.

Marketing of wheat, barley, and oats grown in the prairie provinces is controlled by the Canadian Wheat Board (CWB). The CWB functions as a state trading agency with a monopoly on purchasing and marketing all western grown wheat, barley, and oats destined for domestic human or industrial use or export. In this capacity, the CWB pools its receipts from the sale of wheat, barley, and oats in a given year and distributes its net returns to growers in the form of payments that are the same for all producers of each grade of grain delivered.

Prior to planting each spring, the CWB sets initial prices (guaranteed minimum prices) for the different grades in six grain pools--wheat, durum wheat, feed barley, designated (malting quality) barley, feed oats, and designated (milling quality) oats. Initial prices reflect the CWB's price expectations for the coming marketing year, and are set at roughly 75 percent of projected returns. Since they are guaranteed by the federal government, initial prices act as a floor under the market. By adjusting the relative level of initial prices for each of the pools, the federal

government is able to send clear price signals to farmers before planting begins. In this way, initial prices function as one of the government's primary production policy instruments. Reflecting the decline in world grain prices and near record stocks in recent years, initial prices for the 1987/88 marketing year were down an average of 23 percent from the previous year.

When they deliver their grain, prairie producers receive an initial payment from the CWB based on the initial price minus handling costs and transportation charges. If sales are better than expected or prices strengthen, producers receive an interim payment after harvest but before the end of the marketing year. After all of the grain delivered to the CWB is sold, receipts are pooled and expenses deducted to determine whether a final payment can be made for each grain pool. If actual returns are below expenses for any of the pools, causing them to run a deficit, there are no final payments and the federal government is required to cover the loss. Although final payments have been made on more than half of the grain pools during the past two marketing years (1985/86 and 1986/87), the CWB has turned in total losses of C\$311 million during this period.

The marketing of Canadian oilseeds is not handled directly by a marketing board. However, the government does actively promote the export of Canadian oilseeds through the Grain Marketing Bureau of External Affairs. The Bureau works closely with the Canola Council of Canada to develop markets and coordinate regular consultations with Japan, the largest buyer of Canadian rapeseed.

Nearly all of the grains and oilseeds produced for export in Canada are grown in the prairie provinces, a great distance away from export terminals. Canada's interior is sparsely populated and is not traversed by a navigable system of inland waterways. To encourage settlement of the interior, the federal government entered into an agreement with the Canadian Pacific Railway in 1897 (the Crow's Nest Pass Agreement) to subsidize the construction of a railroad to serve the prairie provinces in exchange for fixing freight rates on grain. The agreement served its function well until the 1960's when increased costs reduced the profitability of grain transportation and the railroads failed to make needed investments in capital and equipment. The condition of boxcars and branch lines was allowed to deteriorate to the point that the railway system became a constraint to expanding grain export volumes in the 1970's.

In 1983, the Crow's Nest Pass Agreement was replaced by the Western Grain Transportation Act (WGTA). Under the WGTA, western producers are slated to pay an increasing, albeit strictly controlled, share of railway costs and the federal government makes up the difference between the producers' contributions and annual rate increases. Although the WGTA was intended to phase out the Crow's Nest rail subsidy, the producer's share of rail costs was frozen at the 1985/86 level for the 1986/87 marketing year to shield prairie producers from the planned rate increase. As a result, the producer's share actually fell from 30 percent during the first year of the Act to 21 percent in 1987/88. A recent study by the Economic Research Service (ERS) of the Department of Agriculture found that transportation subsidies were the single most important source of government support received by western grain producers during the period between 1980/81-85/86. <sup>1/</sup>

1/ Carol A. Goodloe, "Government Intervention In Canadian Agriculture," Staff Report No. AGES871216, Economic Research Service, USDA, December 1987.



The CWB controls access by farmers to the grain handling system through delivery quotas. Each year, around the time of harvest, the CWB announces delivery quota entitlements for each of the principal grains based on a number of factors, including the pace of sales and quantity of grain needed. The quotas normally are adjusted in the course of the marketing year to reflect changes in market conditions. Since all producers receive the same price for their grain irrespective of delivery date, the CWB's quota system is designed to afford farmers equal access to the grain handling system, while controlling the timing of deliveries and avoiding congestion at harvest. Under this system, farmers are required to bear the cost of storing their grain during periods of excess stocks.

Canada's western producers operate in an unusually risky environment, resulting from their reliance on export markets and the uncertainty associated with weather patterns on the prairies. In recognition of this fact, the federal and provincial governments have implemented a variety of programs over time to stabilize producer prices and incomes, while maintaining adequate food supplies and export volumes and preserving the family farm structure. As a result, government outlays to agriculture have risen to around 3 percent of total federal expenditures in recent years, even though Canada's farming population has declined steadily since World War II and the agricultural sector now generates less than 5 percent of GDP. In "Government Intervention In Canadian Agriculture," ERS found that western grain and oilseeds producers are the principal beneficiaries of recent policy moves by the federal government designed to blunt the effects of falling world prices. This policy shift was particularly pronounced in the following cases:

- o Western Grain Stabilization Program (WGSP) - The Western Grain Stabilization Act (WGSA), passed in 1976, established this voluntary program for stabilizing the cash income of western producers of wheat; barley, oats, rye, flaxseed, rapeseed, and mustardseed. The WGSP guarantees that the net cash flow to participating producers from the sale of covered commodities in any one year will not fall below the average realized during the preceding 5-year period. Participating western farmers pay a levy equal to 1 percent of their gross receipts from sales of the covered commodities, up to C\$60,000, and the federal government contributes another 3 percent. Currently, about 85 percent of prairie farmers participate in the program.

Prior to 1984, payments under the WGSP were rare, but since then, larger and larger payments have pushed the fund C\$1.5 billion into arrears. Under the provisions of the WGSA, the federal government is required to meet payments to participating producers until the deficit and accumulated interest are recovered through producer and government levies. In December 1987, the federal government wrote off roughly half of the WGSA's total deficit, but there is no immediate prospect for the recovery of the fund. Large payouts will continue until the low grain prices of recent years are factored into the estimate of 5-year average cash flow that triggers stabilization payments. Following the final disbursement for 1986/87, participants who paid the individual maximum levy during the 11-year history of the program had received a return of C\$7.31 for every dollar they paid into the fund.

- o Special Canadian Grains Program (SCGP) - In December 1986, the federal government announced that it would disburse a total of C\$1.0 billion dollars under the SCGP to grains and oilseeds producers across Canada in an effort to cushion the impact of falling world grain prices. The scheme paid a direct subsidy, or deficiency payment, to producers of wheat, barley, oats, rye, mixed grains, corn, soybeans, rapeseed, flaxseed, and sunflowerseed on the basis of their 1985/86 planted acreage and representative regional yields. Two disbursements of C\$300 million in January and C\$700 million in April were made under the program to grain and oilseeds farmers prior to the beginning of the 1987/88 crop year. The average grain farmer received about C\$5,000, and the maximum payment per producer was limited to C\$25,000. In December 1987, the federal government announced that the program would be extended another year and that C\$1.1 billion would be paid out this year.
- o The CWB Two-Price Wheat Program - The CWB, as the sole seller of wheat for food and industrial use to millers and processors, establishes the domestic price of wheat. Until 1986, the milling price was set equal to the weighted average of the CWB's asking prices for exports at Thunder Bay, Vancouver, and Prince Rupert. To insulate Canadian consumers from wide price fluctuations, the export price was bounded by a floor and ceiling price. In a weak world market, when the export price fell below the floor price, consumers subsidized producers. In 1986, the CWB shifted the thrust of the two-price wheat program away from price stabilization to income support by setting the domestic wheat price at C\$257 per metric ton, where it remains, well above the current world market level. As a consequence of the U.S.-Canada free trade agreement, the Canadian government announced that it will phase out the two-price system.

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TABLE 10  
CANADIAN GRAIN AND OILSEED PRODUCTION

HARVESTED AREA												
-----Thousand Hectares-----												
	TOTAL GRAINS	Barley	Corn	Mixed Grains	Oats	Rye	Wheat	TOTAL OILSEEDS	Flaxseed	Rapeseed	Soybeans	Sunflower seed
1972/73	17,802	5,062	537	836	2,470	257	8,640	2,130	535	1,343	164	88
1973/74	18,752	4,835	544	810	2,725	261	9,577	2,126	587	1,297	190	52
1974/75	17,889	4,770	597	733	2,499	352	8,938	2,042	587	1,279	168	8
1975/76	18,068	4,463	635	743	2,414	334	9,479	2,579	567	1,829	158	25
1976/77	19,616	4,353	706	645	2,409	251	11,252	1,217	324	720	153	20
1977/78	18,599	4,751	724	624	2,132	250	10,118	2,340	596	1,453	223	68
1978/79	18,377	4,263	782	606	1,828	319	10,579	3,728	526	2,825	285	92
1979/80	17,572	3,724	893	595	1,541	330	10,489	4,777	931	3,406	279	161
1980/81	19,094	4,634	958	579	1,515	310	11,098	3,047	554	2,080	277	136
1981/82	21,592	5,476	1,139	544	1,561	445	12,427	2,268	466	1,402	279	121
1982/83	21,412	5,149	1,107	532	1,612	458	12,554	2,849	631	1,777	364	77
1983/84	21,444	4,333	1,075	511	1,400	428	13,697	3,176	431	2,334	364	47
1984/85	21,195	4,566	1,192	503	1,406	370	13,158	4,285	720	3,071	405	89
1985/86	21,657	4,750	1,123	439	1,263	353	13,729	3,999	740	2,783	405	71
1986/87	22,047	4,829	994	383	1,287	315	14,239	3,806	755	2,641	384	26
1987/88 APR.	21,519	5,046	998	391	1,263	313	13,508	3,780	615	2,671	460	34
YIELD												
-----Tons/Hectare-----												
1972/73	1.990	2.229	4.708	2.547	1.874	1.339	1.680	1.041	0.837	0.981	2.287	0.875
1973/74	1.956	2.113	5.292	2.444	1.861	1.414	1.688	1.014	0.840	0.944	2.089	0.788
1974/75	1.724	1.843	4.389	2.248	1.591	1.418	1.488	0.895	0.598	0.910	1.792	1.500
1975/76	2.053	2.131	5.740	2.467	1.856	1.647	1.802	1.040	0.785	1.005	2.323	1.200
1976/77	2.279	2.415	5.319	2.433	2.005	1.757	2.096	1.141	0.855	1.163	1.634	1.200
1977/78	2.268	2.483	5.797	2.575	2.018	1.624	1.963	1.405	1.096	1.358	2.601	1.191
1978/79	2.254	2.437	5.157	2.705	1.981	1.897	1.999	1.262	1.087	1.238	1.811	1.304
1979/80	2.038	2.272	5.580	2.810	1.933	1.591	1.638	1.068	0.875	1.001	2.355	1.354
1980/81	2.170	2.430	6.005	2.848	1.999	1.445	1.738	1.241	0.798	1.194	2.491	1.221
1981/82	2.352	2.506	5.859	2.682	2.042	2.083	1.996	1.362	1.004	1.319	2.176	1.364
1982/83	2.488	2.712	5.883	2.788	2.256	2.037	2.130	1.376	1.192	1.252	2.330	1.221
1983/84	2.211	2.356	5.519	2.274	1.981	1.932	1.935	1.209	1.030	1.118	2.019	1.085
1984/85	2.038	2.255	5.893	2.656	1.899	1.795	1.611	1.195	0.964	1.111	2.264	1.079
1985/86	2.225	2.608	6.207	2.882	2.166	1.612	1.766	1.374	1.219	1.257	2.499	1.155
1986/87	2.579	3.030	5.947	2.828	2.526	1.933	2.204	1.526	1.359	1.434	2.500	1.385
1987/88 APR.	2.431	2.850	7.021	2.780	2.371	1.575	1.950	1.576	1.281	1.442	2.754	1.529
PRODUCTION												
-----Thousand Metric Tons-----												
1972/73	35,430	11,285	2,528	2,129	4,630	344	14,514	2,218	448	1,318	375	77
1973/74	36,678	10,218	2,879	1,980	5,070	369	16,162	2,155	493	1,224	397	41
1974/75	30,839	8,791	2,620	1,648	3,977	499	13,304	1,828	351	1,164	301	12
1975/76	37,099	9,510	3,645	1,833	4,480	550	17,081	2,681	445	1,839	367	30
1976/77	44,696	10,513	3,755	1,569	4,831	441	23,587	1,388	277	837	250	24
1977/78	42,174	11,799	4,197	1,607	4,303	406	19,862	3,287	653	1,973	580	81
1978/79	41,430	10,387	4,033	1,639	3,621	605	21,145	4,705	572	3,497	516	120
1979/80	35,803	8,460	4,983	1,672	2,978	525	17,185	5,101	815	3,411	657	218
1980/81	41,429	11,259	5,753	1,649	3,028	448	19,292	3,782	442	2,484	690	166
1981/82	50,774	13,724	6,673	1,459	3,188	927	24,803	3,089	468	1,849	607	165
1982/83	53,269	13,966	6,513	1,483	3,637	933	26,737	3,919	752	2,225	848	94
1983/84	47,409	10,209	5,933	1,162	2,773	827	26,505	3,839	444	2,609	735	51
1984/85	43,189	10,296	7,024	1,336	2,670	664	21,199	5,119	694	3,412	917	96
1985/86	48,179	12,387	6,970	1,265	2,736	569	24,252	5,494	902	3,498	1,012	82
1986/87	56,866	14,634	5,911	1,083	3,251	609	31,378	5,809	1,026	3,787	960	36
1987/88 APR.	52,306	14,382	7,007	1,087	2,995	493	26,342	5,959	788	3,852	1,267	52

1988 WINTER GRAIN PROSPECTS IN THE NORTHERN HEMISPHERE  
OUTSIDE THE UNITED STATES

SUMMARY: Winter grains account for roughly one-third of the world total wheat and coarse grain output. Winter grain production prospects in the Northern Hemisphere outside the United States are generally favorable, particularly in the Soviet Union, China, and Europe. Dry weather has been a problem in South Asia, the southern Balkans, North Africa, and Mexico. The area planted to winter grains during the fall of 1987 for harvest in 1988 in the Northern Hemisphere excluding the United States is estimated to be down slightly from last year. Sown area reductions in western Europe, North Africa, South Asia, and Mexico more than offset increases in China and Turkey. Harvested area of winter grains may, however, be up from last year since winterkill has been low in the Soviet Union.

EC-12: Winter grain conditions are good to very good across western Europe. Many areas experienced excessive rainfall last fall, which hampered the 1987 harvest and delayed, and in some cases prevented, fall sowings of winter grains. For the continent as a whole, temperatures averaged 2 degrees centigrade above normal for the season, accelerating the growth of winter grains in most places. The general absence of a killing frost, together with unusually warm, humid weather this winter, could result in increased insect, disease, and weed problems. For the region, the area sown to winter grains is estimated down slightly due to adverse weather conditions at planting.

- o France: Winter grain area is virtually unchanged for 1988/89. Sowings last fall were delayed by drought in the South and heavy rains in the North. Unusually mild and humid weather through the winter resulted in accelerated fall growth and early emergence from dormancy in most areas. As of February, winter crops in the southwest were reported to be almost a month ahead of normal development, raising the possibility that the brief period of freezing weather in late February caused some yield loss.
- o United Kingdom: Excessively wet weather last fall in East Anglia hampered the 1987 grain harvest and delayed, and in some cases prevented, fall sowing of winter grains. Large areas in the region were not drilled, resulting in a reduction in national sown area of roughly 5 percent. Overall, area sown to spring grains is expected to increase by as much as 10 percent this year. Increased spring barley area will moderate somewhat the long-run trend toward increased wheat area at the expense of barley. Weather through the winter was exceptionally mild and wet, and yellowing of winter grains due to waterlogged fields and leached nutrients has been observed. Nonetheless, the outlook is for yields to reach the average level of recent years.
- o West Germany: Fall sowings of winter grains were delayed several weeks by rainy weather. Total winter grain area is virtually unchanged for 1988/89; a 6-percent decline in barley area was offset by a 7-percent increase in wheat sowings. Mild temperatures through the winter supported plant growth; in most areas winter grains never entered dormancy. Excessive moisture for the season has left soils saturated and resulted in reports of isolated fungus problems. However, winter grains are reported to be in good condition.



- o Spain: Winter grains were planted under very good conditions. Above average temperatures and rainfall through January aided in the establishment and early growth of fall-sown cereals and the spring wheat crop planted in early January in the South. There is concern about available soil moisture as the crops enter the heading stage because the major grain-producing regions have received little rainfall since late February. In the past 2 years, the area sown to high-quality spring wheat varieties in the South has increased from 300,000 to 900,000 hectares, displacing durum wheat and spring barley.
- o Italy: Heavy rains during November and most of December prevented wheat planting in many areas of central Italy. As a result, total wheat area is forecast down 7 percent for 1988/89. Planted area in central Italy, which accounts for roughly 15-20 percent of total durum area, is estimated down at least 10 percent, resulting in an estimated 5-percent decline in overall durum area. Official weather data indicates that this has been the warmest winter in 30-35 years with temperatures averaging 3-4 degrees centigrade above normal. Crop conditions are reportedly good in the North despite 3 weeks of dry February weather in the Po Valley.
- o Belgium/Luxembourg: Fall sowing conditions for wheat were ideal and mild temperatures throughout the winter have accelerated growth. Barley was sown late due to prolonged fall rains, but seeding conditions were relatively good and an unusually warm winter has favored the crop's development. The recent shift of area from winter barley to wheat continued this year.

EASTERN EUROPE: The outlook for winter grains throughout most of eastern Europe is good. In the northern areas of eastern Europe, above normal precipitation during the fall and mild temperatures throughout the winter months resulted in good establishment of winter grain stands. There was below normal winterkill due to the above normal temperatures and mild conditions. In the southern Balkans, dry weather in the fall delayed planting and germination of some winter crops. These areas subsequently received rain and had above normal temperatures which aided plant growth and development in late 1987 and early 1988.

- o Hungary: Dry conditions persisted in some pockets of the Hungarian Plain until late October, delaying the germination and establishment of fall plantings. Winter wheat area is estimated to have declined slightly this year. Conditions improved during December as precipitation increased and temperatures remained mild. Generally favorable weather with good rainfall in early 1988 has further improved growing conditions and increased soil moisture for spring growth.
- o East Germany: Despite a wet fall and a late harvest, winter grain seeding was completed this year on a slightly larger area. Normal precipitation and mild winter temperatures have resulted in a winter grain crop which is in good condition although phenologically ahead of normal development for this point in the season. There are areas in the northeast and southeast which are unfavorably wet and this could result in increased crop damage due to pests and diseases.

- o Poland: Winter wheat, barley, and triticale plantings have increased by 7 percent in 1988. The mild winter has been favorable to winter grains except in the northeast where above normal precipitation has caused some flooding and left soils unfavorably wet. The mild, wet winter weather could lead to the development of pest and disease problems.
- o Yugoslavia: Attractive prices and favorable weather in November and December resulted in a slightly larger winter wheat and barley area this year. Unseasonably warm weather from December through February permitted good germination and establishment of the mostly late-planted winter grain stands.
- o Romania: The mild winter and improved rainfall during the late fall and winter months has been very beneficial for the winter grain crop. Winter grains are well established and in good condition. The winter wheat and barley crops have entered the spring with higher than normal yield potential.
- o Bulgaria: Winter grains are in good condition in northern Bulgaria due to near normal rainfall and mild winter temperatures. However, in the south-central districts, below normal precipitation has reduced soil moisture to unfavorably low levels. Continued above normal spring precipitation will be needed in these areas to sustain good growth.

USSR: A chronology of conditions affecting the Soviet winter grain crop follows:

Moisture conditions for emergence and establishment of the 1988 winter grain crop were mostly favorable and much better than the previous year when moisture deficiencies had an adverse impact. For the most part, above-normal September precipitation provided abundant soil moisture for winter grain emergence and early plant establishment. However, patchy areas of dryness in Moldavia and the southern Ukraine may have hindered early growth. Following a pattern of mild weather in early October, unseasonable cold weather began over northern winter grain areas on October 18 and spread south. In the North, the cold weather induced winter grains into dormancy. In the South, hardening began in major producing areas of the Ukraine and North Caucasus about 1-2 weeks earlier than usual. In November, southern winter grains entered dormancy with moderate hardening.

Overwintering conditions were mostly favorable. The combination of generally abundant snow cover and near-to-above-normal temperatures appears to have kept winterkill below the usual level. The coldest weather occurred from January 28 through February 3, when minimum temperatures dropped to around -25 to -32 degrees Celsius as far south as the Ukraine and North Caucasus. While adequate snow cover provided protection in most areas, some localized damage was possible in the extreme eastern Ukraine and the northern North Caucasus where snow cover was shallow. Reports as late as mid-March indicated the potential for damage to winter grains in the southern Black Soils Zone as the result of ice crusting. There have also been reports of damage in several northern rye areas. A deep, persistent snow cover over "slightly frozen" soil resulted in snow mold which caused plants to die. Moisture accumulations during the winter were near-to-above-normal over much of European USSR.



Since early March, temperatures have steadily risen to above normal in most areas. The unseasonable warm weather has caused the snow line to recede in the North and promoted earlier-than-usual winter grain growth in the Ukraine and the North Caucasus. Near-to-above-normal March precipitation over the Baltic States, Belorussia, the Ukraine, and the North Caucasus has provided abundant soil moisture for early crop growth. In the southern regions, including Moldavia, winter grains resumed growth 7-10 days earlier than usual.

#### NORTHWEST AFRICA

- o Morocco: The area devoted to barley and durum fell slightly this year, while soft wheat area increased. Large barley stocks have made production unprofitable for producers. Growing conditions for all winter grains have been much more favorable than last year. Above normal seasonal rainfall and near normal temperatures have resulted in generally favorable production prospects although recent weather has been dry. Additionally, the crop is threatened by locust infestation located east of the Atlas mountains. National spraying efforts are under way to restrict swarm migrations.
- o Algeria: Winter grain plantings are slightly below last year, due to dry planting weather. Although regional precipitation levels have varied, growing conditions have been generally unfavorable. Production is expected to be lower than last year. Locust swarms, currently situated south of the growing area, could produce an additional threat. Spraying efforts are under way.
- o Tunisia: Winter grain area fell 75 percent this year due to extremely poor planting conditions. Below-normal precipitation and high temperatures throughout the season have resulted in unfavorable crop conditions for both wheat and barley. As in the other North African countries, locusts have been spotted south of the growing areas and control operations have begun.

#### ASIA:

- o India: Autumn planting conditions following the summer drought were unfavorable for winter grains in the primary northwest growing region. Low soil moisture availability delayed planting and normal establishment of wheat seedlings. Post-monsoon rains (October-December) were normal to above normal in much of the rainfed wheat areas of central India. Periodic and timely rainfall, accompanied by warm temperatures and adequate irrigation supplies, have boosted the crop outlook substantially since mid-January. Wheat area is estimated to be down 5 percent from last year. The wheat yield potential is favorable.
- o Pakistan: Most of the wheat was planted late due to dry fall weather and delays in harvesting cotton. Deficient soil moisture in the northern Punjab rainfed wheat areas resulted in extremely poor wheat germination and establishment. Recent heavy downpours in this region have recharged soils, but also inundated flowering wheat in the predominantly irrigated zone west of Lahore. Wheat area is expected to have declined due to unfavorable early season conditions, while yield prospects remain poor.

- o China: After autumn dryness reduced planted area for the 1987 winter wheat crop, the 1988 area is estimated up 1 percent and current winter grain yield prospects are very favorable. It was dry during the planting season, but rainfall in mid-October provided adequate moisture for fall germination and growth. A drought developed on parts of the North China Plain and in the northwest during the winter, but moisture conditions have improved since February over most of the area and the crop is doing well. Soil moisture levels remain low in Hebei and Shandong provinces in northern China; good spring rains will be needed. The southern grain area had better weather and soil moisture conditions in the fall of 1987 than in 1986, but heavy rain this spring and recent cold temperatures may have caused some local flooding and frost damage.
- o Japan: The weather was mild and warmer than usual for winter crops, particularly in the northern half of Japan. In western Japan, unusually heavy precipitation this winter may have caused some water damage. Moderate rain in March provided more than adequate soil moisture for spring planting. Wheat and barley area is expected to increase as farmland is diverted from rice production to reduce unwanted surpluses. The outlook for winter grain yields is favorable.
- o South Korea: Mild temperatures and moderate rainfall have benefited winter grains on the Korean peninsula. Although it was dry during fall planting, precipitation was near normal through the winter and early spring. Conditions for winter grains are favorable. Planted area for winter crops is estimated up in response to government policies that encouraged increased production.

#### MIDDLE EAST:

- o Turkey: In general, weather conditions have been favorable for planting and crop development throughout the major agricultural areas. The winter grain crop is in good condition.
- o Syria, Lebanon, and Israel: Normal to above normal precipitation and near normal temperatures since last October have created favorable growing conditions for both the winter wheat and barley crops.
- o Jordan: Precipitation since the November planting has been below normal resulting in less than favorable growing conditions for nonirrigated winter grains.

#### NORTH AMERICA:

- o Canada: The area planted to winter wheat and fall rye in late 1987 is estimated to be up 8 percent from last year; winter wheat represents 9 percent of the total wheat area. Ontario experienced a 64-percent increase in sown winter wheat area while the western provinces saw a 18-percent decline. Extremely dry weather in the prairie provinces from September through February has left soil moisture levels very low and is likely to retard spring growth.



- o Mexico: Winter wheat production is expected to be down sharply from last year. Most of the decline in production is due to a reduction in planted area which came as a result of low reservoir levels; nearly 95 percent of the winter wheat crop is irrigated. Reservoir levels in the important northwestern wheat region of Mexico are currently at one-third of capacity compared to three-quarters last year. Area has also been reduced due to the quarantining of land infected with kernel bunt disease. Yield of the 1987/88 winter wheat crop is expected to be average. Timely rains fell at planting and during the grainfill stage which augmented water available from irrigation.

Note: The forecast of wheat and coarse grain area, yield, and production for the 1988/89 year will appear in the May edition of the World Agricultural Production report.

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## ARGENTINE CROP OUTLOOK

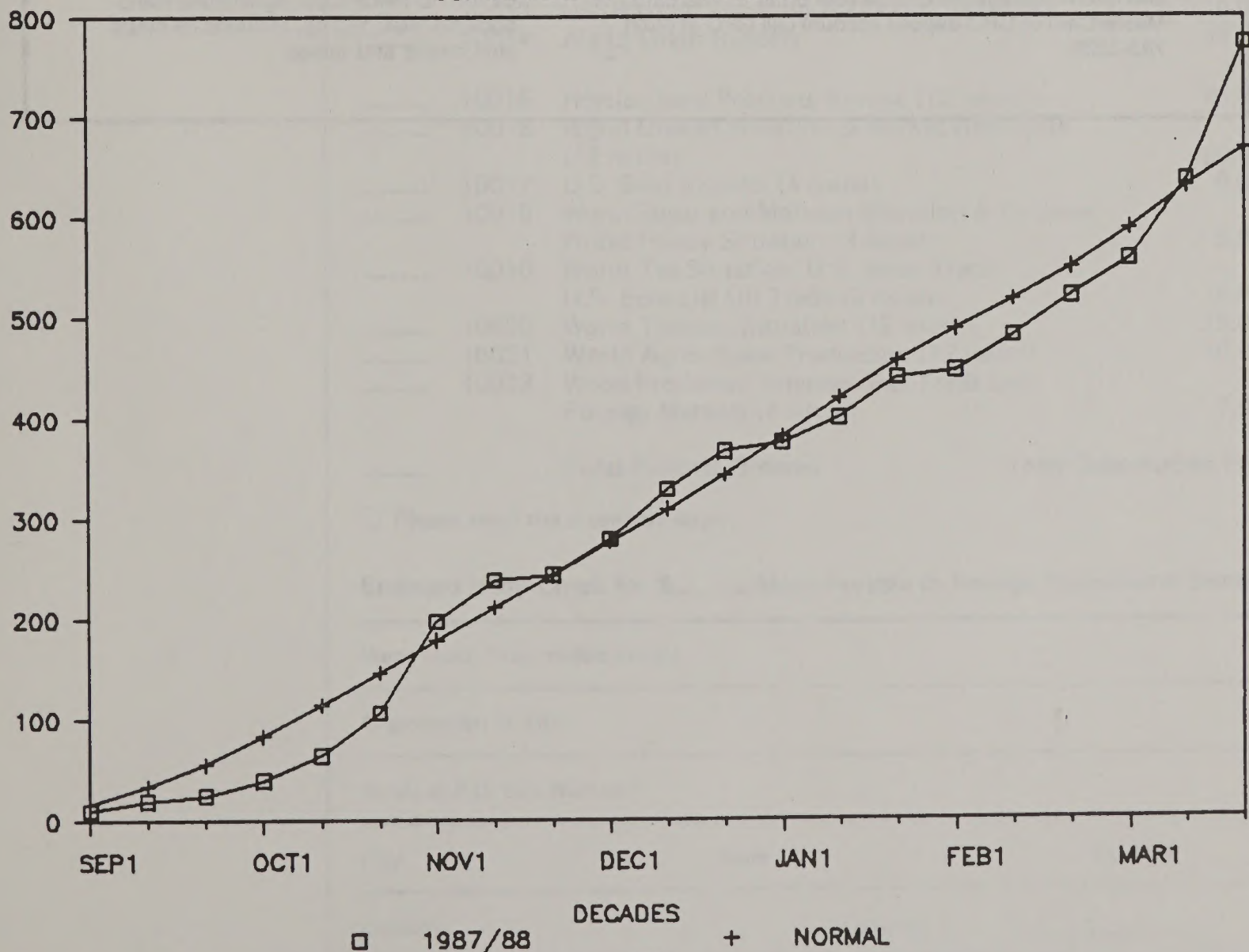
Argentine corn, cotton, sorghum, soybean, and sunflower crops have fared quite well this season as generally normal weather favored crop development. Soybean and corn plantings were briefly delayed by dryness during September and early October in the primary central Argentine crop areas. Steady rains resumed in mid-October and provided adequate to good soil moisture for the remainder of the season (see Figure 1). Heavy to locally excessive rains fell in the central pampa during the second week of March, causing local flooding in northwestern Buenos Aires. Flooding mainly affected sunflowerseed areas, interfering with harvest and possibly reducing yield prospects to more normal levels. The heavy rains have not significantly damaged corn and soybean stands in other parts of the central pampa. Additional heavy rains late in March generally fell outside the main crop regions.

Good weather this crop season has resulted in better crop yields than last year for most crops. Higher corn yields have largely offset a sharp decrease in planted area this year, resulting in only a slight decline in expected production. Sorghum production is expected to be improved this year due to higher yields than last year from about the same amount of planted area. The shift from corn into soybean and sunflower production and the generally favorable weather conditions should make oilseed production this year significantly higher than last year.

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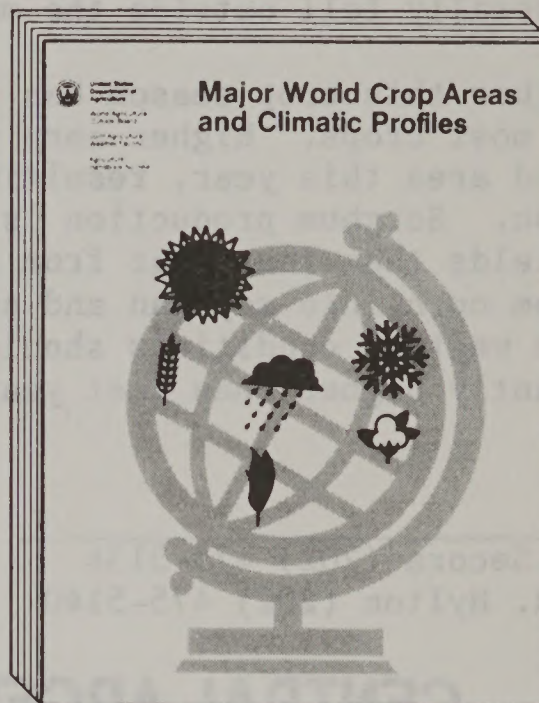
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